CHILTON'S JUNE 1983

Commercial Carrier Journal...

for Private Fleets & For Hire Trucking

Special Report:
DOT proposes total deregulation of the industry

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THE TOP 100

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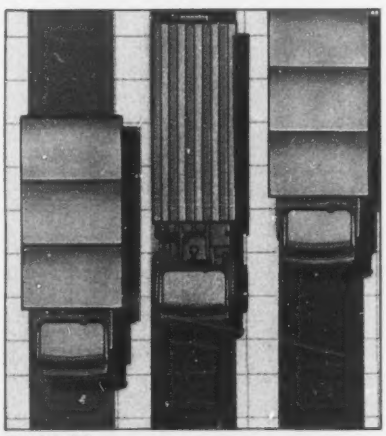

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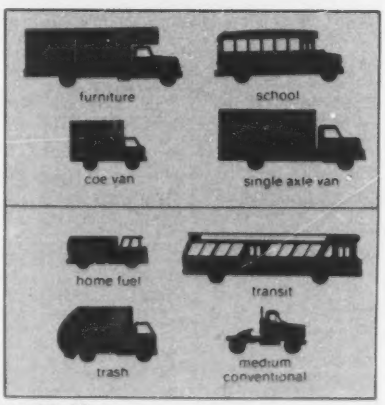

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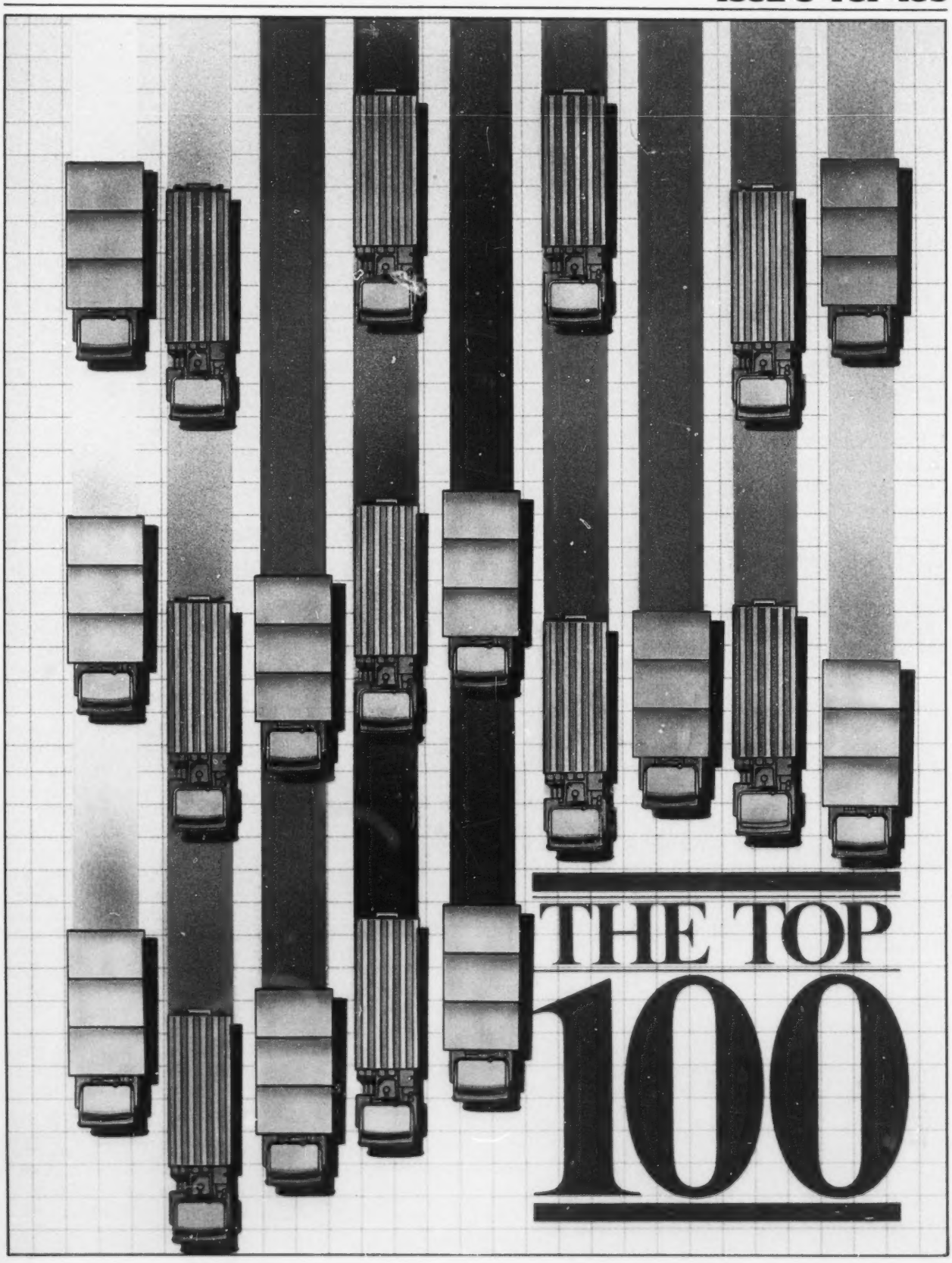

THE TOP
100

1982: A DISASTROUS YEAR

This section, Trends & Statistics and Private Fleets are available as a 24-page booklet at $4. Write: Editor, Commercial Carrier Journal, Chilton Way, Radnor, Pa. 19089.

The top 100 for-hire fleets are beginning to heave their first sighs of relief upon reliable indications that an economic recovery is mounting. They can look back at 1982, knowing that they survived the worst year in trucking's history.

By **CARL GLINES**, *Executive Editor*, and **DOROTHY DI NUNZIO**, *Directories and Special Projects*

Financial reports of the 1982 top 100 for-hire motor carrier business activities confirm reports claiming that, while for-hire trucking's condition is not terminal, 1982 certainly was a financial disaster.

An analysis of the top 100 financial data for 1982, as reported exclusively to *Commercial Carrier Journal* by Trinc Transportation Consultants of Washington, D.C., discloses the biggest shakeup of the top 100 since July 1969, when this information was first compiled.

For example, a record setting 39 motor carriers lost money last year, including two carriers that were not in the Top 100 last year, Refiners Transport & Terminal of Ohio and Advance Transportation Company of Milwaukee.

Combined losses for the 39 carriers were in excess of $191 million. This includes companies like McLean Trucking of Winston-Salem, N.C., acquired at mid-term last year by Meridian Express of Dallas, an affiliate of Wedge International of the Netherlands. Wedge also owns Merchants Fast Motor Lines. Meridian also purchased Delta California, parent corporation of Delta Lines and California Motor Express.

Pacific Intermountain Express of Walnut Creek, Calif., a subsidiary of IU International, Philadelphia, Pa., is also among the money losers. P.I.E. reported losses of $3,862,000 on revenues of $394,474,000. Significantly, IU just announced that it was consolidating P.I.E. with its other big general commodity carrier, Ryder Truck Lines of Jacksonville, Fla. Ryder, last year, earned $3.36 million on gross revenues of $622 million and will be the dominant carrier in the consolidation.

What will happen to P.I.E.'s top management, headed by W. Doyle Beatenbough, as a result of this move remains to be seen. However, it is expected that P.I.E. officials in Walnut Creek will be playing a significantly reduced role in the company's overall operations. Beatenbough earlier attributed much of P.I.E.'s financial problems to high labor costs. In asking 200 of his headquarters employees last November to take a voluntary cut of 15% in salary, Beatenbough said: "P.I.E. and most other unionized carriers just cannot survive against non-union competition considering existing union labor pay scales."

Also reporting losses—$3,000,000—was Smith's Transfer of Staunton, Va., owned by ARA. ARA is one of the country's largest food service and school bus companies; it is headquartered in Philadelphia. ARA just announced the acquisition of Cooper Motor Lines of Greenville, S.C., an owner operator irregular route carrier that had sales of $19.2 million in 1982.

ABF Freight of Ft. Smith, Ark., was another big loser last year, reporting a $12,100,000 loss. But these figures could be distorted because of ABF's acquisition of East Texas Motor Freight of Dallas in 1982. Other losses were reported by such highly regarded carriers as Transcon Lines of Los Angeles; Lee Way Motor Freight of Oklahoma City; Matlack Inc. and Chemical Leaman, the two big eastern Pennsylvania-based tank carriers; and Tri-State Motor Transit of Joplin, Mo., the owner operator carrier specializing in hauling military and commercial nuclear material.

The biggest losers among 1982's top 100 were McLean, $17,267,000; Pacific Motor Freight of San Francisco, $16,600,000; Interstate of Grand Rapids, Mich., $16,257,000. Each of these carriers had an unusually high operating ratio (see charts).

Lee Way, Halls Motor Transit (a subsidiary of Flying Tiger of LA) and IML Freight of Salt Lake City, appear to be financially hemorrhaging.

For example, IML's losses last year topped 1981 losses by $7.7 million, with the company reporting a 1982 loss of $14.3 million on top of a $6.68 million loss in '81. Lee Way losses increased $7.3 million last year to $12.4 million, and Halls reported losses of $9.4 million for 1982 following a $3.9 million loss in '81—a $5.5 million increase.

Irwin H. Silberman, a Potomac, Md., based transportation consultant said general freight carriers lost money last year because of the "combined

Continued

pressures of deregulation and a severe recession."

According to Silberman, 63 carriers went out of business between January 1979 and November 1982. These 63 carriers, he says, represented 14.1% of industry revenues. He also says that carriers representing another 35% of the industry's revenues are candidates for failure.

Another indication of disastrous 1982 business activity in the trucking industry was the record number of bankruptcies among the top 100. Included are Spector-Red Ball, Dallas; Jones Motor, Spring City, Pa.; Midwest Emery Freight, Chicago; Motor Freight Express, York, Pa.; Briggs Transportation, St. Paul; and Eazor Express, Pittsburgh. It should be remembered, however, that a number of for-hire motor carriers that filed for bankruptcy, or for reorganization, have retained their owner operator, specialized commodity divisions, and these operations are profitable. Jones and Eazor Express are two examples of this unique situation.

T.I.M.E.-DC ceased its nationwide operations last year in a dispute over wages and benefits with the Teamster union. While not the biggest employer in town, the Lubbock, Texas-based company reportedly had the largest payroll. After weeks of no activity, the union relented, and a new contract was approved. But freight operations have not yet recovered to prestrike levels. T.I.M.E.-DC last year lost $12.18 million, dropping in ranking to 120 in the second 100 from 37th in the top 100.

Another well-known carrier that does not appear in the top 100 this year is Maislin Transport, a Delaware corporation and subsidiary of Maislin Industries Ltd., of Montreal. Maislin dropped out of the top 100 in 1982 after the company failed to file by deadline, attributing the delay in filing to bookkeeping problems. The company also had not filed by the deadline this year.

Maislin became the source of much controversy in Canada late last year because of a $34 million loan guarantee from the Ottawa government. In a financial statement released in late October, Maislin said it lost $12.7 million (U.S.) in 1981 and another $10.9 million in the first half of 1982. Maislin president Alan Maislin attributed the losses to "fierce competition in Canada and the U.S...and unprecedented rate discounting." Maislin said it had closed or sold 39 terminals, reduced its truck fleet to 5000 units from 7800 and reduced the number of employees to 4200 from 5900.

The lack of enforcement by the Interstate Commerce Commission of its rules and regulations is also reflected in the top 100 statistics. For example, this year, more than any other time since 1969, many carriers simply did not file or chose not to provide full information. Twenty-seven top 100 carriers did not provide data on tire costs, tonnage, and/or shipments carried and vehicles owned or leased. Also, according to Trinc, financial data on 24 carriers had to be calculated from quarterly reports rather than obtained from the usual annual reports. Washington sources say that if Congress sunsets the ICC in 1983 or '84, this information on the performance of for-hire carriers will no longer be available, unless it is voluntarily made public by the companies themselves—an unlikely alternative.

But no matter how bad the trucking industry had it in 1982, some companies still made money. Not as much, perhaps, as they are used to making, but they continue to be profitable.

This includes the two United Parcel Service companies that are numbers one and two on the top 100 list, although some hardliners in the industry refuse to recognize UPS as a legitimate trucking operation.

Another company that continues to be profitable is Roadway Express of Akron, Ohio, earning $74.2 million on gross revenues of $1.1 billion. The company's 1982 gross revenues were slightly better than 1981. Despite the recession and bad economic conditions, Roadway continues to grow, retaining its number three postion in the top 100. Just last month, the company announced it had opened another five terminals, bringing the company's total number of terminals in service to 513. In 1982, Roadway opened 29 facilities and plans on expanding its terminal network even more in 1983.

Roadway also has major plans for expansion into Canada. But that expansion, along with plans to turn over its entire fleet in three years, revitalizing it with all new, more productive equipment, is on hold. Regulatory confusion that can be traced directly to the implementation of the Surface Transportation Assistance Act of 1982, and the possibility of confiscatory federal and state taxes, have temporarily sidetracked the nations largest regular common carrier.

Consolidated Freightways of Portland, Ore., continues its firm hold on fourth place in the top 100. It reported over $1 billion in gross operating revenues for 1982 but earned less last year than it did in 1981. CF earned, after taxes, $36.7 million in '82 but a more appealing $67 million in 1981 on gross revenues of $1 billion.

In a recent report to shareholders, Consolidated Freightways' president Raymond O'Brien was upbeat about the future. He predicted a much improved 1983, and said conditions were already improving, attributing some of the improvement to the drop in diesel fuel prices, which, O'Brien said, had come down 15% between January 1 and April 1 of 1983.

Another way of comparing how well or how poorly a company did is by examining its 1982 operating ratio (OR). Last year, 41 for-hire carriers had ORs greater than 100, meaning they were spending more money than they were earning. Sixteen of these 41 were top 100 repeats from 1981.

A-P-A Transport of North Bergen, N.J., had the best OR, an amazing 82.9, earning $6.5 million in 1982. In 1981, A-P-A reported an OR of 84. Overnite Transportation of Richmond, Va., was second best in 1982, with an 86.2 OR. Interestingly, A-P-A had the best operating ratio despite the fact it is completely unionized and operates in the most congested areas in the country—New York and northern New Jersey, while Overnite has resisted numerous attempts at unionization and still continues to rival A-P-A as one of the nation's best run and best managed companies.

Getter Trucking of Billings, Mont.,

which reported the best OR in 1981, 79.5, had a terrible 1982 and saw it's OR climb to 102. The company also fell out of the top 100 where it ranked 97 in 1981 and is now in the second 100, ranked 146.

In its financial analysis of the trucking industry, the Chase Manhattan Bank says: "...various ratio measures of profitability confirm the financial deterioration of general freight carriers." Chase says while the average size of the carriers in the industry has increased each year over the last five years, average revenue and average earnings per carrier have shrunk in "absolute dollar terms."

Chase says the economic outlook for 1983 indicates that the motor carrier industry should not anticipate brighter days until the second half of 1983. "It will be unfortunate," Chase added, "if many of the companies that survive this extremely difficult period are unable to participate in the forecasted growth of late 1983."

Investment in revenue equipment has understandably been low, Chase observed, and predicts that by mid-'83 equipment should be in need of replacement. But, Chase says, in most cases, motor carrier cash flow is adequate to service only existing debt. Obtaining additional financing will be difficult because of the industry's "track record of two years of poor earnings."

Like CF's O'Brien, Chase also believes that lower fuel prices will help to stimulate a recovery among for-hire carriers this year. Chase also said that cost savings from "lower fuel prices have helped reduce the impact of rate discounting." But Chase sees no long-term savings in fuel costs and suggests that prices may go back up as the economy gets stronger.

Chase observes that in the more competitive environment in which trucking now operates, the successful carrier is the carrier that becomes more sophisticated in marketing and sales. "Sales orientation is increasingly geared toward determining the needs of the shipper and solving his distribution problems in a cost-effective manner," Chase says.

Chase adds: "We continue to state that the future belongs to the well-managed, well-financed and well-positioned companies in highway transportation."

About the best thing that can be said about 1982 is that it is history. With a disastrous year behind them, for-hire carriers must now put on a bright face and learn to do better what they do best: moving the nation's freight in the most efficient, most cost effective manner possible.

CCJ

Index To The Top 100 As Ranked By Revenue

	1982	1981
AAA Cooper Transportation	94	—
ABF Freight System	10	13
A-P-A Transport	59	76
Advance Transportation	100	—
Aero Mayflower	21	24
Allied Van Lines	12	11
American Freight System	17	19
Anchor Motor Freight	28	28
Associated Truck Lines	25	29
Atlas Van Lines	44	45
BN Transport	67	83
Bekins Van Lines	26	34
Bowman Transportation	45	35
Branch Motor Express	42	39
Brown Transport	37	43
C & H Transportation	46	38
CRST Inc.	65	66
C W Transport	58	58
Campbell "66"	63	65
Carolina Freight	14	16
Central Freight	24	22
Central Transport	39	49
Chemical Express	87	91
Chemical Leaman	34	31
Churchill Truck Lines	81	—
Coastal Tank	71	71
Commercial Carriers	53	59
Commercial Lovelace	74	66
Complete Auto Transit	29	50
Consolidated Freightways	4	4
Crete Carrier Corp.	80	—
Delta Lines	38	41
Duff Truck Line	93	100
Frozen Food Express	85	87
Garrett Freightlines	36	36
Gordons Transports	54	55
Graves Truck Lines	72	78
Global Van Lines	69	77
Groendyke	83	88
Hall's Motor Transit	20	20
Holland Motor Express	82	95
Holmes Transportation	92	—
Interstate System	18	18
I M L Freight	40	33
Illinois-California Exp.	55	51
Internatl. Transport	47	42
Jones Truck Lines	43	57
Lee Way Motor Freight	23	21
Lynden Transport	66	—
M & G Convoy	79	89
Mason & Dixon	35	30
Matlack Inc.	32	23
McLean Trucking	7	7
Merchants	51	53
Midwest Coast Transport	77	84
Midwestern Distribution	73	92
Milne Truck	66	82
Mistletoe Exp. Service	88	—
Motor Convoy	84	94
Murphy Motor Freight	62	68
National Freight	64	70
No. American Van Lines	8	8
Northwest Transport	75	—
Nu-Car Carriers	61	80
Old Dominion	49	60
Oneida Motor Freight	99	—
Overland Express	95	—
Overnite Transportation	11	14
P.I.E.	9	9
Pacific Motor	41	56
Penna. Truck Lines	70	—
Pilot Freight	33	40
Poole Truck Line	86	—
Preston Trucking	19	27
R-W Service System	96	75
Red Star Express	56	67
Refiners Transpt. & Term.	98	—
Refrigerated Transport	31	46
Riss Internatl. Corp.	60	82
Roadway Express	3	3
Ryder Truck Lines	6	6
St. Johnsbury	27	44
Santa Fe Trail	90	90
Schneider Transport	30	32
Schwerman Trucking	76	73
Shaw, Willis	89	98
Signal Delivery	22	26
Smith's Transfer	13	12
Southeast Freight Lines	97	—
System 99	78	74
Thurston Motor	52	61
Transcon Lines	15	15
Transus Inc.	57	64
Tri-State	50	48
United Parcel (Ill.)	1	1
United Parcel (NY)	2	2
United Transport	91	79
United Van Lines	16	17
Watkins Motor	48	52
Yellow Freight	5	5

1982'S TOP 100

Rank '82	Rank '81	Fleet	Type[1]	Financial Data (+ 000)			Owner Vehicles[2]			(+ 000) Total Gross Rev.
				Gross Oper. Revenue	Expenses	Net Income after Taxes[3]	Trucks	Tractors	Trailers	
1	1	**United Parcel Service—OH, St. Charles, IL**	CMGF	$3501929	$3147014	$189233	25825	3785	13245	$223907
2	2	**•United Parcel Service—NY, New York, NY**	CMGF	1392047	1311891	38173	na	na	na	na
3	3	**Roadway Express, Akron, OH**	CMGF	1147459	1063883	74237	1117	7354	14494	83524
4	4	**Consolidated Freightways, Portland, OR**	CMGF	1036826	979701	36711	245	6329	16863	73813
5	5	**Yellow Freight System, Overland Park, KS**	CMGF	903562	867071	10358	561	5412	13346	70497
6	6	Ryder Truck Lines, Jacksonville, FL	CMGF	622235	612518	3361	841	2920	6615	35228
7	7	McLean Trucking, Winston-Salem, NC	CMGF	491892	514252	17627d	204	3158	6514	35877
8	8	North American Van Lines, Fort Wayne, IN	CMHG	491273	471042	21450	34	81	6701	N/A
9	9	Pacific Intermountain Exp. Walnut Creek,CA	CMGF	394474	400570	3862d	362	2259	6875	28523
10	13	ABF Freight System Inc., Ft. Smith, AR	CMGF	302902	307591	12100d	251	1780	5665	16321
11	14	**Overnite Transportation, Richmond, VA**	CMGF	287820	255098	18415	177	2765	5882	23117
12	11	**•Allied Van Lines, Broadview, IL**	CMHG	273958	274700	1791	na	na	na	na
13	12	**Smith's Transfer, Staunton, VA**	CMGF	270231	274582	3000d	332	2611	4803	17930
14	16	**Carolina Frt. Carriers, Cherryville, NC**	CMGF	1268374	256389	6024	169	1944	4018	20253
15	15	**Transcon Lines, Los Angeles, CA**	CMGF	249409	256758	7161d	137	1697	3624	19997
16	17	•United Van Lines, Fenton, MO	CMHG	245426	245158	1346	na	na	na	na
17	19	American Freight System, Sioux Falls, SD	CMGF	241633	242550	37	65	1478	4560	15817
18	18	Interstate System, Grand Rapids, MI	CMGF	226673	240370	16257d	112	1443	3473	11896
19	27	Preston Trucking, Preston, MD	CMGF	218048	211903	5145	40	1609	3591	15295
20	20	Halls Motor Transit, Mechanicsburg, PA	CMGF	215335	224925	9412d	64	1766	3924	16603
21	24	**Aero Mayflower Transit, Indianapolis, IN**	CMHG	202214	196911	3561	0	11	1095	N/A
22	26	**Signal Delivery Service, Hinsdale, IL**	CTRS	193293	182632	7888	287	1387	5728	133776
23	21	**Lee Way Motor Frt., Oklahoma City, OK**	CMGF	187932	214272	12438d	154	1355	3861	12062
24	22	**•Central Freight Lines, Waco, TX**	CMGF	187745	183450	6140	na	na	na	na
25	29	**•Associated Truck Lines, Grand Rapids, MI**	CMGF	183117	185673	1425d	na	na	na	na
26	34	•Bekins Van Lines, Hillside, IL	CMHG	174497	170098	3807	na	na	na	na
27	44	St. Johnsbury Trucking, St. Johnsbury, VT	CMGF	167269	157035	5450	0	0	0	8285
28	28	Anchor Motor Freight, Cleveland, OH	CTMV	162741	160252	1174	0	1923	2104	13437
29	50	Complete Auto Transit Inc., Detroit, MI	CTMV	162234	150656	5920	0	1668	1668	19756
30	32	•Schneider Transport Inc., Green Bay, WI	CMSC	160072	158817	1024	na	na	na	na
31	46	**•RTC Transportation Inc., Forest Park, GA**	CMRS	157426	151007	2166	na	na	na	na
32	23	**•Matlack Inc., Lansdowne, PA**	CMLP	156163	153303	1011d	na	na	na	na
33	40	**Pilot Frt. Carriers, Inc., Winston-Salem,NC**	CMGF	154034	161411	7480d	46	786	1976	10760
34	31	**Chemical Leaman Tank Lines, Downingtown, PA**	CMLP	151456	152843	2735d	0	1099	2926	19234
35	30	**Mason & Dixon Lines, Kingsport, TN**	CMGF	149014	157507	10750d	183	1193	2386	8193
36	36	Garrett Freightlines, Pocatello, ID	CMGF	148258	144033	2082	194	1086	2471	9934
37	43	•Brown Transport Corp., Atlanta, GA	CMGF	137711	130122	5474	na	na	na	na
38	41	Delta Lines Inc., Oakland, CA	CMGF	137097	137535	513d	335	1471	3203	7944
39	49	•Central Trnsport Inc., Sterling Hgts., MI	CMGF	136971	134737	3242	na	na	na	na
40	33	I M L Freight, Salt Lake City, UT	CMGF	133100	143941	14398d	117	974	2068	11412
41	56	**Pacific Motor Truck, San Francisco, CA**	CMGF	131856	147739	16600d	358	722	1607	12581
42	39	**•Branch Motor Express, New York, NY**	CMGF	128854	136786	10785d	na	na	na	na
43	57	**•Jones Truck Lines Inc., Springdale, AR**	CMGF	128278	121190	4446	na	na	na	na
44	45	**Atlas Van Lines Inc., Evansville, IN**	CMHG	127870	123472	5161	0	2	79	N/A
45	35	**Bowman Transportation, Atlanta, GA**	CMGF	127217	131229	1394d	258	1309	3150	10693
46	38	C & H Transptn. Co. Inc., Dallas, TX	CMSC	116409	109245	2681	10	287	2652	6961
47	42	International Transport Inc., Rochester, MN	CMHM	113554	109756	1387	0	0	2588	4457
48	52	Watkins Motor Lines Inc., Atlanta, GA	CMGF	111357	107007	1775	24	232	160	4144
49	60	Old Dominion Frt. Lines Inc., High Point, NC	CMGF	105040	101506	557	48	642	1562	7418
50	48	Tri-State Motor Transit, Joplin, MO	CMHM	103032	102503	703d	18	339	2306	8622
		TOTAL TOP 50—1982		$17,217,317	$16,924,519	$288,983	42,897	96,877	187,783	1,027,147
		TOTAL TOP 50—1981		17,746,723	16,938,537	808,425	43,686	78,534	183,948	1,096,749
		TOTAL TOP 50—1980		16,236,813	15,469,718	767,095	46,835	78,668	178,385	1,030,311

Avg. Gr. Wt. Trailer	($ 000) Tires & Tubes	Tons Carried* TL	Tons Carried* LTL	No. of Shipments TL	No. of Shipments LTL	Miles Operated: Owned Vehicles	Miles Operated: Rented Vehicles With Drivers	Miles Operated: Rented Vehicles Without Drivers	Miles Operated: Int'c & Misc.	Avg. Load (tons)	Avg. Haul (miles)	1982 Oper. Ratio	1981 Oper. Ratio	Rank By Oper. Ratio
2826	$19730	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	89.9	88.6	4
na	na	na	na	na	na	na	na	na	na	na	na	94.2	93.9	16
827	11810	1549	3273	136	9759	358184	1929	0	11148	14.2	1121	92.7	91.9	7
902	9300	1722	2692	142	7384	350055	21925	38	7572	15.9	1365	94.5	92.4	t18
1037	9809	1928	2267	143	6776	311950	20957	21883	2626	13.9	1186	98.2	96.2	t33
426	6253	3941	1505	248	3469	163671	40973	69677	3708	13.8	704	98.4	95.0	t35
660	6123	1311	1369	103	4270	176935	10031	11039	6734	12.7	970	104.5	101.4	t62
N/A	5254	N/A	2101	N/A	N/A	N/A	327625	0	0	6.5	1014	95.9	94.8	t20
375	4005	2628	762	140	2345	139130	18451	17873	186	14.3	741	101.5	97.1	t50
228	2604	1106	798	77	2049	104556	13018	12085	0	14.1	959	101.5	97.9	t50
445	3902	1325	1358	98	3825	134638	0	1	93	9.9	499	88.6	86.2	2
na	na	na	na	na	na	na	na	na	na	na	na	100.3	99.9	t42
298	2573	794	1077	64	2466	108518	0	0	118	12.1	701	101.6	97.6	51
364	2738	846	928	64	2261	82567	9877	744	3958	11.9	661	95.5	95.9	19
257	2566	805	580	62	1490	91926	15193	0	552	16.8	1244	102.9	99.7	57
na	na	na	na	na	na	na	na	na	na	na	na	99.9	100.9	t40
252	2641	668	864	50	2313	64450	141	19836	109	11.5	635	100.4	99.4	43
152	2074	1645	625	99	1678	64025	24614	7702	992	14.2	609	106.0	102.8	66
269	1904	1220	874	93	2149	50184	9257	9097	2000	11.6	401	97.2	95.5	t28
215	1898	1085	776	77	1967	51638	3372	8527	0	12.2	418	104.5	102.6	t62
N/A	168	N/A	381	N/A	N/A	0	94704	0	0	4.2	1033	97.4	98.0	t29
na	3450	N/A	2006	N/A	N/A	90672	0	0	0	6.6	296	94.5	95.2	t18
169	1481	714	442	48	1173	79647	7126	2058	380	14.7	1133	114.9	103.9	72
na	na	na	na	na	na	na	na	na	na	na	na	97.7	93.7	t32
na	na	na	na	na	na	na	na	na	na	na	na	101.4	101.0	t49
na	na	na	na	na	na	na	na	na	na	na	na	97.5	98.1	30
112	1473	574	772	813	2603	0	0	34808	0	8.7	226	93.9	96.9	t14
218	4008	N/A	1913	N/A	N/A	75098	0	976	0	7.0	277	98.5	95.6	t36
189	3746	N/A	1645	N/A	N/A	74824	8799	0	0	8.0	408	92.9	99.2	9
na	na	na	na	na	na	na	na	na	na	na	na	99.2	99.4	t37
na	na	na	na	na	na	na	na	na	na	na	na	95.9	97.6	t20
na	na	na	na	na	na	na	na	na	na	na	na	98.2	91.1	t33
145	1845	552	622	44	1573	58816	2247	846	835	11.1	684	104.8	102.6	63
297	3543	N/A	5389	N/A	N/A	67992	18547	1277	0	13.0	711	100.0	98.7	46
83	1723	987	467	84	1852	38439	8572	11775	0	13.7	564	105.7	99.8	65
102	1338	457	581	33	1911	43310	0	0	2411	15.1	666	97.2	93.6	t28
na	na	na	na	na	na	na	na	na	na	na	na	94.5	93.4	t18
118	1022	368	708	30	1899	22400	7101	5003	93	13.7	433	100.3	101.9	t42
na	na	na	na	na	na	na	na	na	na	na	na	98.4	102.5	t35
179	1230	277	324	22	784	40174	3156	6970	3850	15.6	1390	108.1	101.7	69
150	1647	N/A	1352	N/A	N/A	25863	1995	0	20412	6.9	425	112.8	112.7	71
na	na	na	na	na	na	na	na	na	na	na	na	106.1	104.6	67
na	na	na	na	na	na	na	na	na	0	na	na	94.5	93.9	t18
N/A	89	N/A	243	N/A	N/A	150	53331	0	0	4.6	1016	96.6	97.2	t24
191	2209	1026	411	84	1123	57015	7429	0	764	13.9	502	103.2	98.0	58
45	4250	N/A	1289	N/A	N/A	18820	81956	0	0	12.8	991	93.8	89.9	13
0	2293	896	0	60	0	0	72646	0	0	14.9	1209	96.7	95.1	t25
66	1286	526	199	33	500	14977	54421	0	0	12.4	1261	96.1	94.8	22
120	2166	1418	322	95	746	25695	35878	410	0	12.2	435	96.6	97.4	t24
115	2410	N/A	881	N/A	N/A	26231	61869	0	0	12.4	1244	99.5	95.7	38

485 282,896
242 203,145
253 223,966

1982'S TOP 100

Rank '82	Rank '81	Fleet	Type[1]	Financial Data (+000)			Owned Vehicles[2]			(+000)
				Gross Oper. Revenue	Expenses	Net Income after Taxes[3]	Trucks	Tractors	Trailers	Total Equip. Exp.
51	53	•Merchants Fast Motor Lines, Abilene, TX	CMGF	$98293	$88478	$4885	na	na	na	na
52	61	Thurston Motor Lines, Charlotte, NC	CMGF	97344	94422	1766d	358	705	2621	7523
53	59	Commercial Carriers Inc., Southfield, MI	CMMV	96084	92778	3414	0	1247	1379	12262
54	55	•Gordons Transports Inc., Memphis, TN	CMGF	95370	97252	4327d	na	na	na	na
55	51	Illinois-California Express, Denver, CO	CMGF	94602	96563	910	243	527	1791	6918
56	67	Red Star Express Lines, Auburn, NY	CMGF	88442	82115	2728	37	734	1230	6938
57	64	Transus Inc., Atlanta, GA	CMGF	86937	84636	1364	125	600	1271	5684
58	58	C W Transport Inc., Wisconsin Rapids, WI	CMGF	84474	87306	1075d	4	899	1943	6708
59	76	A-P-A Transport Corp., North Bergen, NJ	CMGF	81472	67549	6519	338	223	561	4672
60	62	•Riss International Corp., Kansas City, MO	CMGF	81116	82587	1247d	na	na	na	na
61	60	Nu-Car Carriers Inc., Bryn Mawr, PA	CMMV	79158	77301	240	0	691	843	8548
62	68	Murphy Motor Frt. Lines Inc., St. Paul, MN	CMGF	79048	80527	1336d	17	498	1631	3773
63	65	Campbell "66" Express, Springfield, MO	CMGF	78713	78649	88	50	648	1205	6142
64	70	•National Freight Inc., Vineland, NJ	CMGF	78146	79230	754	na	na	na	na
65	66	•CRST Inc., Cedar Rapids, IA	CMGF	71934	69626	2241	na	na	na	na
66	82	Milne Truck Lines, Salt Lake City, UT	CMGF	71322	74911	2277d	99	415	1312	3698
67	83	BN Transport Inc., Denver, CO	CMGF	68251	69946	922d	20	354	518	2764
68	106	•Lynden Transport Inc., Seattle, WA	CMGF	68238	61494	5778	na	na	na	na
69	77	Global Van Lines Inc., Anaheim, CA	CMHG	68197	67078	444	0	5	35	N/A
70	134	•Pennsylvania Truck Lines, Philadelphia, PA	CMGF	67266	64543	3086	na	na	na	na
71	71	Coastal Tank Lines Inc., Akron, OH	CMLP	66312	67022	3480d	0	352	845	6559
72	78	•Graves Truck Line Inc., Salina, KS	CMGF	65728	67045	1317d	na	na	na	na
73	92	•Midwestern Distribution, Ft. Scott, KS	CMFP	65301	69410	2515d	na	na	na	na
74	66	Commercial Lovelace Motor Frt., Columbus, OH	CMGF	64858	72470	6436d	22	458	1273	3515
75	103	Northwest Transpt. Service, Commerce City, CO	CMGF	62929	55971	3874	0	0	0	3602
76	73	Schwerman Trucking Co., Milwaukee, WI	CMSC	61071	61392	2462d	0	750	1849	7213
77	84	Midwest Coast Transport, Sioux Falls, SD	CMRS	60530	59093	660	0	5	304	430
78	74	System 99, Oakland, CA	CMGF	60122	60993	3962d	95	629	1306	3827
79	89	M & G Convoy Inc., Buffalo, NY	CMMV	59594	53461	120	0	685	771	7659
80	105	Crete Carrier Corp., Lincoln, NE	CMGF	59240	55712	2321	0	2	275	na
81	110	Churchill Truck Lines, Chillicothe, MO	CMGF	58571	57705	502	77	524	975	na
82	95	Holland Motor Express Inc., Holland, MI	CMGF	57929	54628	2149	10	501	917	4889
83	88	Groendyke Transport Inc., Enid, OK	CMLP	57048	55021	1152	0	382	549	5691
84	94	Motor Convoy Inc., Atlanta, GA	CMMV	56071	56084	790d	0	87	126	4304
85	87	FFE Transptn. Services Inc., Dallas, TX	CMRS	55906	56222	124	0	0	527	2345
86	114	Poole Truck Line, Evergreen, AL	CMBM	55359	51831	830	0	844	1402	na
87	91	Chemical Express Carriers, Dallas, TX	CMSC	55146	53328	258d	0	817	1476	7304
88	143	•Mistletoe Exp. Serv., Oklahoma City, OK	CMGF	55053	53512	338	na	na	na	na
89	98	Shaw Willis Frozen Exp., Elm Springs, AR	CMRS	54890	51205	1902	0	223	453	2607
90	90	Santa Fe Trail Transptn., Wichita, KS	CMGF	54662	54551	431	32	483	498	3738
91	79	United Transport Inc., Oklahoma City, OK	CMMV	54273	56152	1872d	0	784	838	7858
92	101	Holmes Transptn. Inc., Framingham, MA	CMGF	54228	54221	341	113	387	1043	4317
93	100	Duff Truck Line Inc., Lima, OH	CMGF	53159	55134	2378d	12	314	1137	3652
94	128	AAA Cooper Transportation, Dothan, AL	CMGF	51101	50250	85	57	305	797	2598
95	135	Overland Express Inc., Blaine, MN	CMGF	50792	47718	1046	0	0	927	na
96	75	•R-W Service System, Taylor, MI	CMGF	50737	51225	1154d	na	na	na	na
97	108	Southeastern Freight Lines, Columbia, S.C.	CMGF	50654	47214	2980	125	562	935	na
98	107	Refiners Transpt. & Terminal, Oregon, OH	CMLP	50330	50354	2013d	3	313	642	5207
99	136	Oneida Motor Freight Inc., Carlstadt, NJ	CMGF	49975	50108	111	104	295	507	na
100	130	Advance Transportation Co., Milwaukee, WI	CMGF	49577	49181	448d	40	253	519	3093
		TOTAL TOP 100—1982		$3,282,386	$3,170,822	$329,945	34,545	82,378	205,721	1,312,536
		TOTAL TOP 100—1981		21,842,318	20,697,356	457,850	45,614	92,466	221,545	1,312,536

Maintenance Data		Intercity Operating Data (+000)												
		Vans Carried[a]		No. of Shipments		Miles Operated				Avg. Load (tons)	Avg. Haul (miles)	1982 Oper. Ratio	1981 Oper. Ratio	Rank By Oper. Ratio[b]
						Owned Vehicles	Rented Vehicles		Hvll & Water Miles[c]					
Avg. No. Maint. Employe.	(+000) Tires & Tubes	TL	LTL	TL	LTL		With Drivers	Without Drivers						
na	$ na	na	na	na	na	na	na	na	na	na	na	90.0	88.3	5
168	1433	883	416	60	1076	35506	11108	0	0	11.6	418	97.0	93.8	27
129	1683	0	1723	0	157	43747	5812	0	0	5.5	158	96.6	95.6	124
na	na	na	na	na	na	na	na	na	na	na	na	102.0	104.4	154
104	945	357	242	24	696	29788	5215	6951	0	14.1	987	102.1	98.3	55
104	696	252	435	21	1143	13222	202	0	0	10.2	200	92.8	92.1	8
75	1007	563	429	39	1284	14960	15817	0	8029	11.0	524	97.4	93.4	129
129	795	594	330	43	588	23803	3251	2600	203	12.4	403	103.4	94.5	59
48	558	73	344	7	1233	10852	0	0	0	6.4	166	82.9	84.0	1
na	na	na	na	na	na	na	na	na	na	na	na	101.8	98.3	52
77	1448	N/A	1506	N/A	N/A	29386	0	6017	0	6.8	160	97.7	95.0	132
85	711	351	304	26	766	20567	4385	1767	182	11.9	491	101.9	99.8	53
101	868	264	331	21	694	29209	33	0	6	12.8	629	99.9	96.4	140
na	na	na	na	na	na	na	na	na	na	na	na	101.4	99.4	149
na	na	na	na	na	na	na	na	na	na	na	na	96.8	95.3	26
54	793	242	271	17	894	12346	2346	2502	1386	14.2	502	105.0	98.5	64
58	387	347	116	21	255	7145	17580	0	9980	16.1	1182	102.5	98.5	56
na	na	na	na	na	na	na	na	na	na	na	na	90.1	89.1	6
N/A	261	N/A	156	N/A	N/A	0	26838	0	0	4.0	694	98.4	97.2	135
na	na	na	na	na	na	na	na	na	na	na	na	96.0	99.7	21
80	1156	N/A	3594	N/A	N/A	25641	10101	2028	0	12.2	128	101.1	94.6	48
na	na	na	na	na	na	na	na	na	na	na	na	102.0	101.4	154
na	na	na	na	na	na	na	na	na	na	na	na	106.3	98.5	68
47	671	216	384	19	996	14903	0	0	0	10.0	250	111.7	105.8	70
31	87[illegible]	185	204	12	628	0	769	16081	516	15.2	682	82.9	91.7	3
211	1827	N/A	5113	N/A	N/A	35566	6222	0	0	12.0	98	100.5	101.8	44
0	395	N/A	634	N/A	N/A	553	0	61547	0	18.5	1810	97.6	95.5	31
71	838	124	238	11	689	16482	0	1407	0	11.9	589	101.4	103.8	149
84	924	629	10	67	1	23697	0	3828	0	5.2	224	99.8	93.2	39
na	na	na	na	na	na	na	na	na	na	na	na	94.0	94.1	15
na	na	na	na	na	na	na	na	na	na	na	na	98.5	98.3	136
51	707	221	328	20	694	13235	3	0	0	9.7	235	94.3	93.5	17
71	1135	N/A	3661	N/A	N/A	24021	274	21302	0	12.7	158	96.4	94.9	23
60	1228	2071	0	769	0	182	0	56288	0	N/A	N/A	100.0	96.9	141
0	493	N/A	605	N/A	N/A	0	31333	0	0	N/A	N/A	100.6	102.8	45
na	na	na	na	na	na	na	na	na	na	na	na	93.6	90.5	12
126	1653	N/A	5520	N/A	N/A	36908	0	3471	0	13.0	102	96.7	98.5	125
na	na	na	na	na	na	na	na	na	na	na	na	97.2	95.5	126
39	702	N/A	549	N/A	N/A	18483	34387	0	0	17.8	1716	93.3	91.1	11
8	478	211	73	13	160	2104	2206	0	16686	11.5	1004	89.8	96.4	139
115	1338	N/A	1146	N/A	N/A	30395	360	0	0	7.9	211	103.5	99.8	60
106	300	349	293	23	926	18573	78	13	0	5.2	152	100.0	97.8	141
70	391	370	319	29	721	9489	714	2956	0	8.5	162	103.7	98.9	61
53	929	215	322	17	873	14743	984	0	1276	9.2	286	98.3	91.2	34
na	na	na	na	na	na	na	na	na	na	na	na	93.9	96.0	114
na	na	na	na	na	na	na	na	na	na	na	na	101.0	99.6	47
na	na	na	na	na	na	na	na	na	na	na	na	93.2	92.7	10
73	1249	N/A	6274	N/A	N/A	24669	3112	479	0	13.5	61	100.0	91.5	141
na	na	na	na	na	na	na	na	na	na	na	na	100.3	100.5	142
41	190	293	285	22	704	5854	89	5363	0	8.7	170	99.2	96.7	137

435 202,696
242 203,145
253 222,966

Source: Prepared especially for Class Tank Transportation Consultants, a division of Don S Brassfield, Washington, DC, from ICC motor carrier annual reports for 1981. —Operating revenue figure is derived from 1982 fourth quarter cumulative figures. Annual report was not available at closing time. [a]—BM—Building Materials, CM—Common, CT—Contracts, GF—General Freight, EX—Explosives, and dangerous articles, FP—Forest Products, HG—Household Goods, HM—Heavy Machinery, LP—Liquid Petroleum products (including in most cases other bulk commodities), MV—motor vehicles, RS—retail store delivery, SC—specific commodity not otherwise grouped. [b]—"A" following data indicates net loss (deficit) after taxes. [c]—as of Dec. 31, 1982. [d]—where only one figure appears, it represents total tonnage. [e]—predominately carpet. [f]—"T" preceding data indicates tie for that rank. N/A—indicates not applicable. na—indicates data not available.

For-hire carriers in CCJ's second 100 category didn't fare any better in 1982 then their bigger brothers. A recapitulation of the second 100 companies shows total losses of $45.2 million in 1982, compared with losses of $22,182,000 in 1981. Thirty-three companies in the second 100 lost money in 1982, compared with 19 losers in the previous year.

Looking at their operating ratios, Trinc's research shows that 28 had ORs in excess of 100, while another 26 actually improved their operating ratios.

The worst OR was reported by Bekins Moving & Storage Co. of Glendale, Calif., a shocking 154.6. Bekins is reportedly in the process of being acquired. By comparison, the best operating ratio was reported by J.B. Hunt Transport of Lowell, Ark., basically an owner operator company.

Pauls Trucking Corp., Cranford, N.J., made a significant improvement over 1981. Pauls is a distributor for a number of well-known discount stores and Pathmark Grocery chain. Pauls vaulted into the 102 position from 169 and earned $713,000 after taxes on revenues of $48.7 million. Pauls was also one of the 26 for-hire carriers that showed an improved, if only slight, operating ratio of 98.1 for '82, compared to 98.5 the previous year.

Some of the big money losers in the second 100 include Jones Transfer, Monroe, Mich., off $2 million; Hodges Trucking Co., Oklahoma City, down $4.5 million; Clairmont Transfer, Escanaba, Mich., down $2.6 million; and Malone Freight Lines, Birmingham, Ala., off $1.2 million.

Also reporting a loss last year was Schuster Express of Colchester, Conn., down by nearly $1.8 million. Owned and operated by more than four decades by Paul Schuster and family, the company was recently sold to Pilot Freight Lines of Winston-Salem, N.C.

Rank '82	Fleet	Type	Financial Data (+ 000)			
			Gross Oper. Revenue	Expenses	Net Income after Taxes	1982 Oper. Ratio
101	**Boutell F J Driveaway Co, Flint, MI**	**CMMV**	**$49387**	**48043**	**130**	**97.396.6**
102	**Pauls Trucking Corp., Cranford, NJ**	**CTGF**	**48783**	**47828**	**713**	**98.198.5**
103	**Miller Transporters Inc., Jackson, MS**	**CMLP**	**48716**	**47772**	**628d**	**98.193.9**
104	**Burnham Van Service, Columbus, GA**	**CMHG**	**48364**	**43440**	**2296**	**89.888.8**
105	**Sala Motor Freight Lines, Inc., Houma, LA**	**CMGF**	**48328**	**42985**	**3041**	**88.986.1**
106	Melton Truck Lines, Inc., Shreveport, LA	CMBM	48190	48627	21	100.998.8
107	•Mercury Motor Express Inc., Tampa, FL	CMGF	47806	50739	1459d	106.1101.1
108	Jones Transfer Co., Monroe, MI	CMGF	46960	48579	2060d	103.4100.6
109	Red Arrow Freight Lines Inc., San Antonio, TX	CMGF	46940	46487	751	99.096.6
110	C & J Commercial Driveaway, Lansing, MI	CMMV	45036	44088	276	97.997.9
111	**New Penn Motor Express, Lebanon, PA**	**CMGF**	**44831**	**38876**	**5955**	**86.785.2**
112	**Allerman Transport Lines, Ops-Lacks, FL**	**CMRS**	**44671**	**43671**	**266**	**97.896.4**
113	**•Anderson Trucking Service, St. Cloud, MN**	**CMSC**	**44160**	**42775**	**578**	**96.994.5**
114	**•Subler, Carl, Trucking Inc., Versailles, OH**	**CMSC**	**44128**	**44336**	**1256d**	**100.598.8**
115	**•Southwest Motor Freight, Chattanooga, TN**	**CMGF**	**43714**	**41870**	**36**	**95.898.9**
116	•Dart Transit Co., St. Paul, MN	CMGF	43394	39414	2062	90.893.1
117	•Tanksley, Sam Trucking, Cape Girardeau, MO	CMGF	42188	40404	1784	95.888.9
118	NTC of America Inc., Tulsa, OK	CMSC	42155	41331	280	98.0100.4
119	Sanborns Motor Express Inc., Portland, ME	CMGF	41913	40995	700	97.894.7
120	T.I.M.E.-DC, Lubbock, TX	CMGF	41751	47037	12188d	112.7104.4
121	**•Estes Express Lines, Richmond, VA**	**CMGF**	**41527**	**38970**	**1597**	**93.896.1**
122	**Schuster Express Inc., Colcester, CT**	**CMGF**	**41326**	**42236**	**1795d**	**102.497.6**
123	**•DSI Transport Inc., Houston, TX**	**CMSC**	**41195**	**38792**	**622**	**94.292.9**
124	**Ace-Doran Hauling & Rigging, Cincinnati, OH**	**CMSC**	**41158**	**39328**	**1242**	**95.696.6**
125	**Crouse Cartage Co., Carroll, IA**	**CMGF**	**41024**	**40406**	**620**	**98.599.3**
126	•Ruan Transport, Des Moines, IA	CMLP	40818	42811	1375d	104.9102.5
127	•National Carriers Inc., Liberal, KS	CMRS	40613	37368	2494	92.092.7
128	•E & L Transport Co., Dearborn, MI	CMMV	40565	40418	104	99.698.2
129	Hunt, J.B. Transport Inc., Lowell, AR	CMGF	40532	34463	4418	85.091.4
130	Hyman Freightways Inc., St. Paul, MN	CMGF	40434	39298	418	97.296.0
131	**Kenosha Auto Transport Co., Kenosha, WI**	**CMMV**	**40426**	**42216**	**696d**	**104.499.2**
132	**Warren Transport Inc., Waterloo, IA**	**CMHM**	**39745**	**37452**	**?105**	**94.292.0**
133	**Turner Bros. Trucking Co. Inc, Oklahoma City, OK**	**CMSC**	**39704**	**36564**	**1934**	**92.186.2**
134	**•Pre-Fab Transit Co., Farmer City, IL**	**CMBM**	**39661**	**38753**	**550**	**97.799.3**
135	**Clairmont Transfer Co., Escanaba, MI**	**CMGF**	**39093**	**40712**	**2652d**	**104.199.4**
136	•Hodges, Bill Trucking Co., Oklahoma City, OK	CMSC	39087	38142	4573d	97.681.4
137	•Dallas & Mavis Forwarding Co., South Bend, IN	CMMV	38799	38403	65	99.096.4
138	•Farmer, E. L. & Co., Odessa, TX	CMSC	38725	36257	1197	93.684.8
139	Colonial Refrigerated Trnsptn., Knoxville, TN	CMRS	38350	36088	875	94.194.2
140	•Malone Freight Lines, Inc., Birmingham, AL	CMGF	38340	39350	1254d	102.499.8
141	**Daily Exprss Inc., Carlisle, PA**	**CMSC**	**37875**	**35770**	**979**	**94.492.1**
142	**Lyons Transptn, Erie, PA**	**CMGF**	**37813**	**38036**	**166d**	**100.695.6**
143	**Morgan Drive-Away Inc., Elkhart, IN**	**CMSC**	**36800**	**34722**	**1058**	**94.496.3**
144	**Wilson Trucking Corp., Fishersville, VA**	**CMGF**	**36543**	**33276**	**1231**	**91.190.5**
145	**Home Transportation Co. Inc., Marietta, GA**	**CMSC**	**36210**	**35844**	**366**	**99.098.4**
146	•Getter Trucking Inc., Billings, MT	CMSC	35974	36705	78d	102.079.5
147	•Cassens Transport Co., Edwardsville, IL	CMMV	35469	35150	409	99.197.5
148	Pirkie Refrigerated Frt. Lines, De Forest, WI	CMSC	35304	32679	1360	92.694.1
149	Acme Truck Line, Inc., Harvey, LA	CMSC	35092	33579	1091	95.796.3
150	•North Penn Transfer Inc., Lansdale, PA	CMGF	34995	34678	311	99.199.8

Rank '82	Fleet	Type	Financial Data (+000)			1982 Oper. Ratio
			Gross Oper. Revenue	Expenses	Net Income after Taxes	
151	**Jones Motor Co. Inc., Spring City, PA**	**CMGF**	**$34857**	**34759**	**$ 107**	**99.7108.8**
152	**•Gray, Jack Transport Inc., Gary, IN**	**CMOT**	**34842**	**34755**	**242d**	**99.798.1**
153	**Aero Trucking Inc., Monroeville, PA**	**CMSC**	**34577**	**34906**	**516d**	**101.0100.0**
154	**AAA Trucking Corp., Trenton, NJ**	**CMGF**	**34094**	**32925**	**616**	**96.994.6**
155	**Auto Convoy Co., Dallas, TX**	**CMMV**	**33712**	**34028**	**392d**	**100.999.3**
156	•Frederick Transport Ltd., Chatman, Ontario, CN	CMSC	33425	31966	899	95.6
157	•Fleet Transport Co., Inc., Nashville, TN	CMLP	33181	34164	545d	103.098.1
158	Convoy Co., Kirkland, WA	CMMV	32900	33158	173	100.8101.5
159	Carretta Trucking Inc., Paramus, NJ	CMGF	32739	29783	1984	91.091.4
160	•DiSalvo Trucking Co., San Francisco, CA	CMGF	32605	32032	165	98.297.6
161	**•Standard Trucking Co., Charlotte, NC**	**CMGF**	**32531**	**36161**	**143d**	**98.997.0**
162	**Superior Trucking Co., Inc., Atlanta, GA**	**CMHM**	**32058**	**31452**	**259**	**98.198.0**
163	**•Wheaton Van Lines Inc., Indianapolis, IN**	**CMHG**	**31895**	**30681**	**911**	**96.896.5**
164	**•Willig Freight Lines, San Francisco, CA**	**CMGF**	**31822**	**29664**	**1295**	**93.289.7**
165	**•Chem-Haulers Inc., Florence, AL**	**CMSC**	**31584**	**32603**	**1046d**	**103.296.7**
166	George Transfer & Rigging Co., Parkton, MD	CMSC	31552	31981	1210	101.497.5
167	•Curtis Inc., Commerce City, CO	CMRS	31480	31158	171	99.099.9
168	•Mushroom Transptn. Co., Inc., Philadelphia, PA	CMGF	31404	31718	1990d	101.097.8
169	Penn Yann Express, Inc., Penn Yann, NY	CMGF	31174	31040	723d	99.699.3
170	•Sammons Trucking, Missoula, MT	CMBM	30810	29774	444	96.694.8
171	**Janesville Auto Transport, Janesville, WI**	**CTMV**	**30707**	**30573**	**412**	**99.695.6**
172	**Waggoners Trucking, Billings, MT**	**CMGF**	**30661**	**30602**	**163**	**99.896.8**
173	**Texas Oklahoma Express, Irving, TX**	**CMGF**	**30602**	**31360**	**411d**	**102.594.9**
174	**Commercial Carrier Corp., Auburndale, FL**	**CMBM**	**30564**	**28864**	**372**	**94.494.9**
175	**McKenzie Tank Lines, Tallahassee, FL**	**CMLP**	**30381**	**28745**	**1276**	**94.687.2**
176	O K Trucking Co., Cincinnati, OH	CMGF	30338	30430	867d	100.398.0
177	•Truck Transport Inc., St. Louis, MO	CMSC	30294	29595	10	97.796.9
178	Associated Petroleum Carriers, Spartanburg, SC	CMLP	30267	30415	320	100.598.6
179	•McAdams, B. J. Inc., North Little Rock, AR	CMGF	30133	29253	222d	97.193.7
180	Deaton Inc., Birmingham, AL	CMSC	29932	27960	1128	93.492.2
181	**•Missouri Pacific Truck Lines, St. Louis, MO**	**CMGF**	**29920**	**30140**	**617**	**100.7100.8**
182	**•United Trucking Service Inc., Dearborn, MI**	**CMGF**	**29836**	**31139**	**1750d**	**104.4100.4**
183	**McClendon Glenn Trucking Co., Lafayette, AL**	**CMGF**	**29401**	**28115**	**72d**	**95.695.0**
184	**•Mitchell Transport Inc., Cleveland, OH**	**CMSC**	**29071**	**25969**	**778**	**89.386.2**
185	**•Indianhead Truck Line, St. Paul, MN**	**CMGF**	**28760**	**28506**	**345d**	**99.197.4**
186	Walker, B.F., Inc., Denver, CO	CMSC	28745	28551	237	99.392.3
187	Ploof Truck Lines, Jacksonville, FL	CMBM	28577	25391	857	88.889.6
188	B & L Motor Freight, Newark, OH	CMSC	27929	27827	19	99.6101.5
189	•Prime, Inc., Springfield, MO	CMGF	27929	28932	2210d	103.6106.7
190	A & H Truck Line, Inc., Evansville, IN	CMGF	27841	26915	596	96.794.9
191	**•Hyder Clay Trucking Lines, Auburndale, FL**	**CMAC**	**27644**	**24715**	**2272**	**89.491.9**
192	**•Bekins Moving & Storage Co.-CA, Glendale, CA**	**CMHG**	**27375**	**42309**	**941d**	**154.6112.7**
193	**Werner Enterprises, Omaha, NE**	**CMSC**	**27123**	**24177**	**2075**	**89.195.3**
194	**Gross & Hecht Trucking, Edison, NJ**	**LORS**	**26756**	**25115**	**634**	**93.994.8**
195	**Spartan Express Inc., Greer, SC**	**CMGF**	**26451**	**23759**	**423**	**89.890.2**
196	Miller Transfer & Rigging, Cuyahoga Falls, OH	CMHM	26210	26210	615d	98.696.8
197	•Florida Rock & Tank Lines, Jacksonville, FL	CMDT	26208	23964	458	91.492.6
198	•L.C.L. Transit Co., Green Bay, WI	CMSC	25751	26236	273d	101.9101.5
199	•Salt Creek Freightways, Casper, WY	CMGF	25485	27005	2145d	106.0101.1
200	Hirschbach Motor Lines, Sioux City, IA	CMAC	25125	25067	54	99.799.7
	•American Red Ball Transit Co., Indianapolis, IN	CMHG	25006	24817	323d	99.297.4
	TOTALS		**$4,251,725**	**$4,093,989**	**$193,183**	

(Note: Net income total excludes two carriers without net figures reported—Conger Jarrett, No. 169 and Cassens Transport, No. 192.)

Significantly, some of the best run, best managed companies are in the second 100, but at the same time, they are also more sensitive to the changes in the marketplace and to the economic pressures around them. Schuster Express is a good example of that. So is Mushroom Transportation Co. of Philadelphia, a family owned carrier that lost nearly $2 million on revenues of $31.4 million. In addition, a number of carriers in the second 100 that showed improvement in operating ratios are also owner operator carriers. They include companies like Carretta Trucking, earning $1.9 million; Pirkle Refrigerated Freight Lines of Wisconsin, earning $1.3 million; Colonial Refrigerated Transportation of Knoxville, Tenn., $875,000.

Alterman Transport Lines of Opa Locka, Fla., although earning $266,000, increased its OR 1.4 points to 97.8.

Some owner operator companies also turned out to be heavy losers. These include Mercury Motor Express of Tampa, Fla., down $1.4 million with an escalating OR of 106.1, and Carl Subler Trucking of Versailles, Ohio, off $1.2 million and with a rising OR of 100.5.

Carriers that have gone out of business since June '82 include: Cooper-Jarrett of Orange, N.J.; Boss Linco Lines, Buffalo, N.Y.; and Chief Freight Lines of Tulsa, Okla.

Clearly, 1982 was not your typical year for the for-hire segment of the trucking industry. What 1983 will bring to the second 100 remains to be seen. But there is little doubt some carriers listed here will disappear by next year, victims of the recession, deregulation and/or bad management.

A new dawn is on the trucking horizon. For well managed firms, it holds the promise of a rewarding future. But for the poorly managed ones, it looms ominously dark.

INDUSTRY TRENDS AND STATISTICS

No one who is familiar with the current state of the trucking industry would argue the fact that our nation's recession has proven to be a profound depression for carriers of general commodities. Coupled with the depressed 1982 business environment was the continuing impact of deregulation legislation. Add to this, for 1983, the Surface Transportation Assistance Act. Understandably, many industry soothsayers are silent, for still to be determined is the future shape of an industry that was once the most stringently regulated in the country.

Despite all of this adversity and transition, it is still possible to get a handle on who does what in trucking. For example, based on 1981 figures, excluding revenues of $4.6 billion reported by United Parcel Service for that year, general freight carriers accounted for 59.9% of all revenues reported by the for-hire trucking industry. Of this figure, 53.2% represents revenues of intercity common carriers. The other 6.4% was accounted for by other general freight carriers. The remaining 40.4% of the revenue dollar was earned by specialized carriers, such as those hauling heavy machinery, liquid petroleum, refrigerated goods, car carriers and household goods carriers.

Information for *Industry Trends and Statistics* was compiled by *Commercial Carrier Journal*'s editorial and marketing staffs from data supplied by Trinc Transportation Consultants, Inc., a company of the Dun and Bradstreet Corporation; the Motor Vehicle Manufacturers Association; and the Department of Commerce, Bureau of Census, Industry Division.

NUMBER OF FOR-HIRE CARRIERS

The Class I carrier group was enlarged by 52 new members in 1982. This growth is evidence that the merger/aquisition fever is continuing. Also, the total number of for-hire carriers in existence at the end of 1982 was greater than ever before, with 85% of them in the Class 3 ranks (gross annual revenues of less than $1 million).

Year	Class I (Over $5 Million*)	Class II ($1-$5 Million)	Class III (Under $1 Million)	TOTAL
1982	1,083	2,279	19,051	22,413
1981	1,031	2,293	*	18,000*
1980	947	2,164	*	17,000*
1979	992	2,754	13,337	17,083
1978	1,045	2,929	12,900	16,874
1977	1,052	3,101	12,453	16,606
1976	899	2,589	12,984	16,472

* Class III for-hire carriers are not required to report financial operating data to the Interstate Commerce Commission as are most Class I and Class II for-hire carriers. Consequently, a reliable count of the number of Class III carriers in existence is difficult to obtain. The Class III total given above, for 1982, was supplied by the American Trucking Associations, Inc., and is said to be current as of November 1982.

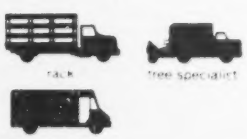
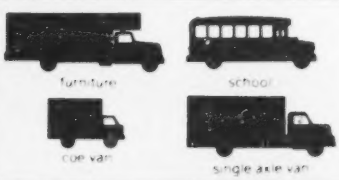
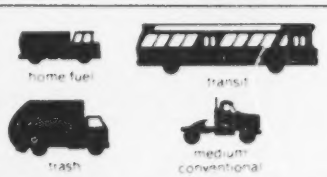
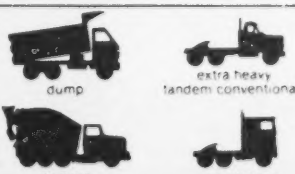
SELECTED FINANCIAL DATA FROM CLASS I AND CLASS II COMMON CARRIERS

Class I and Class II carriers, the *creme de la creme* of the trucking industry, went financially sour in 1982. Combined Gross Operating Revenues for the 686 reporting carriers fell 3.8% ($1.024 billion) while Total Operating Expenses dropped 2% ($527.1 million), but Net Income After Taxes plummeted 56.8% ($417.2 milion) from reported 1981 levels, which were artificially inflated by the massive tax write-offs of operating authority.

All $ Figures Add 000	1981	1982
Number of Carriers	674	686
Gross Operating Revenues	26,688,513	25,664,596
Salaries, Wages & Fringe Benefits	13,835,803	13,723,235
Operating Supplies & Expenses	3,358,259	3,103,593
General Supplies & Expenses	686,854	911,588
Operating Taxes & Licenses	567,255	573,701
Insurance	558,774	516,614
Communications & Utilities	386,560	436,998
Depreciation & Amortization	917,024	929,188
Equipent Rental & Purchased Trnsptn.	4,580,410	4,281,803
Building & Office Equipment Rental	277,332	305,112
Other & Miscellaneous Expenses	72,489	113,880
Total Operating Expenses	25,422,812	24,895,704
Net income before taxes	1,147,030	642,140
Net income after Taxes	734,004	316,818
Operating Ratio (%)	95.3	97.0

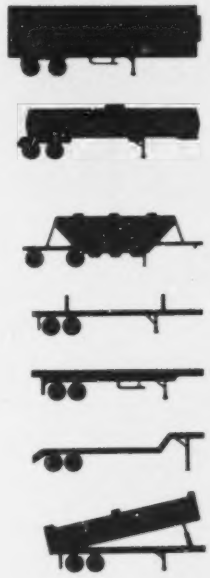
The information in this table was prepared especially for *Commercial Carrier Journal* by Trinc Transportation Consultants, Inc., from *Trinc's Red Book of the Trucking Industry*, 1982 edition. Financial data is based on reports filed with the ICC by Class I and II "instruction 27" carriers (75% of revenue derived from general commodity freight) required to file Quarterly Financial Reports with the ICC. Contract carriers and household movers are excluded. Figures for 1981 are restated on the basis of those carriers filing 1982 returns. Effective January 1, 1982, the ICC relieved all Class I contract carriers and all Class II carriers, except "instruction 27" carriers from filing quarterly reports.

FACTORY SALES OF TRUCKS BY GVW (1938 through 1982)

		No. of Units	% of Total
utility van, compact van, pick up, multi purpose	**CLASS 1** 6,000 lbs. & Less	15,994,754	48.0
utility van, compact van, pick up, walk-in	**CLASS 2** 6,001-10,000 lbs.	12,577,614	37.7
milk bread, walk-in, compact van	**CLASS 3** 10,001-14,000 lbs.	283,294	.8
conventional van, large walk-in	**CLASS 4** 14,001-16,000 lbs.	75,819	.2
 rack, tree specialist, large walk-in	**CLASS 5** 16,001-19,500 lbs.	321,605	1.0
 furniture, school, coe van, single axle van	**CLASS 6** 19,501-26,000 lbs.	1,881,032	5.6
 home fuel, transit, trash, medium conventional	**CLASS 7** 26,001-33,000 lbs.	535,809	1.6
 dump, extra heavy tandem conventional, cement, coe sleeper	**CLASS 8** 33,001 lbs. & Over	1,711,867	5.1
	TOTAL	33,381,794	100.0

Source: Motor Vehicle Mfrs. Assn. and CCJ Marketing Dept.

BREAKDOWN OF NEW TRAILER SHIPMENTS (1968 through 1982)



	Number	% of Total
VANS		
Dry Freight/Closed Top	956,824	46.5
Dry Freight/Open Top	65,243	3.2
Insulated/Semi-Insulated	227,590	11.0
Drop Frame	61,825	3.1
Livestock	21,276	1.0
Total Vans	1,332,758	64.8
SPECIAL TYPES		
Tanks/Liquid	94,718	4.6
Dry Bulk	27,492	1.3
Pole and Logging	23,162	1.1
Flatform	336,199	16.4
Low-Bed	74,274	3.6
Dump	92,317	4.5
All Others	75,024	3.7
Total Special Types	723,186	35.2
TOTAL COMPLETE TRAILERS	2,055,944	100.0
Detachable Trailers[1]	174,942	
Detachable Chassis[2]	204,178	
Dollies and Converter Gear[3]	53,496	

1. Mostly container units. 2. Mostly for use with containers. 3. Separate axle and fifth wheel assembly for converting semi-trailer into full trailer in twin trailer doubles operations.

Source: Industry Div., Bureau of the Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.

FACTORY SALES OF SPECIAL TYPE VEHICLES

Type of Vehicle	1982	1981	1980	1979	1978	1977	1976
Station Wagons[1]	467,922	587,665	425,113	662,154	901,539	969,468	904,666
Trucks with Cab-over Engine	33,157	32,551	43,587	72,504	70,260	71,062	48,699
Trucks with Diesel Engines	219,748	208,938	214,562	227,834	219,915	165,559	107,216
Trucks with 6 Wheels, 3 Axles	59,170	83,103	86,572	142,646	134,296	124,427	80,531
Buses, including School Bus Chassis	26,260	27,295	34,385	32,498	31,378	28,658	30,230
Multi-stop delivery trucks	31,793	25,979	23,148	45,395	73,447	52,573	49,473

1. Includes those built on both car and truck chassis. Source: Motor Vehicle Manufacturers Association

A 15-year analysis of truck factory sales indicates that light-duty Class I and Class II sales, dominated by pick-ups and vans, comprise 86% of the total truck market. The majority of the vehicles in these two classes are used for personal transportation, as a "second car," as recreational vehicles or as farm vehicles. The rest are commercial and fleet vehicles.

In the heavy-duty fleet market, Classes VI and VIII dominate. CCJ's *Census of the Motor Fleet Market* shows that 80% of all Class VII and VIII trucks are used in fleets of 10 or more vehicles. Class VIII includes all three-axle straight trucks and tractors, and some large two-axle trucks. Class VII is mostly two-axle trucks and most of the medium-duty two-axle tractors.

DOMESTIC TRUCK FACTORY SALES BY GVW

Table below shows trends in size groups over a period of years.

Year	6,000- & Less	6,001- 10,000 lb	10,001- 16,000 lb	16,001- 19,500 lb	19,501- 26,000 lb	26,001- 33,000 lb	Over 33,000 lb	Total Domestic
1982	869,897	744,350	10	1,333	22,533	48,568	68,040	1,754,731
1981	583,341	716,556	263	1,843	50,762	41,503	94,958	1,489,226
1980	547,426	679,532	4,827	1,761	50,124	48,728	99,711	1,432,109
1979	961,345	1,413,229	19,727	3,140	109,521	40,235	164,095	2,711,292
1978	1,246,650	1,779,565	39,432	3,736	122,437	36,871	155,579	3,384,270
1977	1,253,409	1,580,533	21,236	4,831	122,423	26,699	140,045	3,149,176

DOMESTIC DIESEL TRUCK SALES

Year	6,000- & Less	6,001- 10,000 lb	10,001- 16,000 lb	16,001- 19,500 lb	19,501- 26,000 lb	26,001- 33,000 lb	Over 33,000 lb	Total Domestic
1982	44,586	72,868	—	—	8,559	26,282	67,453	219,748
1981	47,789	20,393	—	—	19,336	27,651	93,769	208,938
1980	68,868	4,397	—	—	12,337	30,958	98,002	214,562
1979	31,894	653	—	—	14,404	23,121	157,762	227,834
1978	34,751	840	—	—	12,229	22,597	149,498	219,915
1977	2,386	975	—	—	11,142	15,695	135,361	165,559

DIESEL ENGINES USED IN TRUCKS

(Factory sales from U.S. plants including exports)

Make of Truck		Cat	Cummins	Detroit Diesel	IHC	Mack	All Other	Total
Chevrolet	1982	1,068	—	20,543	—	—	59,746	81,357
	1981	1,671	97	3,710	—	—	29,306	34,784
Chrysler	1982	—	—	—	—	—	49	49
	1981	—	—	—	—	—	—	—
Ford	1982	10,073	5,020	7,586	—	—	—	22,679
	1981	11,884	6,902	12,114	—	—	—	30,900
Freightliner	1982	1,385	5,129	472	—	—	—	6,986
	1981	1,843	6,434	1,108	—	—	—	9,385
GMC	1982	2,846	3,518	14,121	—	—	29,052	49,537
	1981	4,696	5,028	12,647	—	—	10,315	32,686
IHC	1982	1,323	14,993	2,205	14,312	—	3	32,836
	1981	2,533	21,405	4,734	18,333	—	433	47,438
Jeep Corp.	1982	—	—	—	—	—	3,264	3,264
	1981	—	—	—	—	—	3,428	3,428
Kenworth	1982	1,842	4,690	574	—	—	—	7,106
	1981	2,525	7,024	1,494	—	—	—	11,043
Mack	1982	670	837	214	—	13,733	86	15,540
	1981	450	749	333	—	18,801	226	20,559
Marmon Motor	1982	—	—	—	—	—	—	—
	1981	33	239	13	—	—	—	285
Mercedes-Benz	1982	—	—	—	—	—	2,036	2,036
	1981	—	—	—	—	—	2,039	2,039
Peterbilt	1982	1,983	3,300	294	—	—	—	5,577
	1981	2,392	4,557	866	—	—	—	7,815
Volkswagen	1982	—	—	—	—	—	5,020	5,020
	1981	—	—	—	—	—	29,867	29,867
White	1982	541	2,187	1,191	—	—	44	3963
	1981	468	3,325	734	—	—	—	4,527
Others	1982	79	239	333	—	—	—	651
	1981	464	547	943	—	—	4	1,958
Total	1982	21,810	39,913	47,533	14,312	13,733	99,300	236,601
	1981	28,959	56,307	38,696	18,333	18,801	75,618	236,714

Source: Motor Vehicle Manufacturers Assn. Reporting firms do not represent entire industry.
"All other" includes Chevrolet, Isuzu, Mercedes, Nissan, Olds, Scandia Vabis and Volkswagen.

TRUCK FACTORY SALES AND TRUCKS WITH DIESELS

GVW Class	Year/Sales with Diesel Engines	Chevrolet	GMC	Chrysler	Ford	Freight-liner	Mack	Navis-tar	AM General	Kenworth	Peterbilt	Western Star	Kenworth Peterbilt Pac/Kw	Others	White	Volvo	Total Trucks
Under	Sales—1982	407,221	100,618	88,430	230,839	—	—	37,503	—	—	—	—	—	—	7,286	—	—	869,897
6,000	w/Diesel—1982	27,021	12,678	—	—	—	—	—	—	—	—	—	—	—	4,887	—	—	44,586
lbs	Sales—1981	286,419	61,960	22,351	137,380	—	—	36,910	—	—	—	—	—	—	38,321	—	—	583,341
	w/Diesel—1981	13,332	5,315	—	—	—	—	—	—	—	—	—	—	—	29,142	—	—	47,789
6,001	Sales—1982	222,835	63,700	22,805	405,761	—	4	29,442	—	—	—	—	—	—	—	—	3	744,350
to	w/Diesel—1982	49,931	22,936	—	—	—	1	—	—	—	—	—	—	—	—	—	—	72,868
10,000	Sales—1981	201,482	48,802	57,520	383,202	—	1,026	24,521	—	—	—	—	—	—	—	—	3	716,556
lbs.	w/Diesel—1981	15,255	4,763	—	—	—	375	—	—	—	—	—	—	—	—	—	—	20,393
10,001	Sales—1982	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
to	w/Diesel—1982	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
14,000	Sales—1981	—	—	248	—	—	—	—	—	—	—	—	—	—	—	—	—	248
lbs	w/Diesel—1981	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
14,001	Sales—1982	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	10	10
to	w/Diesel—1982	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
16,000	Sales—1981	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	15	15
lbs	w/Diesel—1981	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
16,001	Sales—1982	319	1,000	—	—	—	—	—	—	—	—	—	—	—	—	—	14	1,333
to	w/Diesel—1982	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
19,500	Sales—1981	695	1,128	—	—	—	—	—	—	—	—	—	—	—	—	—	20	1,843
lbs	w/Diesel—1981	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
19,501	Sales—1982	3,245	2,881	—	6,582	—	8,470	—	—	—	—	—	1,375	—	—	—	—	22,533
to	w/Diesel—1982	418	686	—	1,032	—	4,848	—	—	—	—	—	1,375	—	—	—	—	8,559
26,000	Sales—1981	14,811	15,733	—	9,687	—	9,012	—	—	—	—	—	1,519	—	—	—	—	50,762
lbs	w/Diesel—1981	4,304	7,720	—	1,575	—	4,218	—	—	—	—	—	1,519	—	—	—	—	19,336
26,001	Sales—1982	6,892	12,504	—	19,961	—	8,749	—	—	—	—	—	661	—	—	—	1	48,568
to	w/Diesel—1982	2,150	4,334	—	11,010	—	8,126	—	—	—	—	—	661	—	—	—	1	26,282
33,000	Sales—1981	—	730	—	25,753	—	14,489	—	—	—	—	2	520	—	—	—	9	41,503
lbs	w/Diesel—1981	—	722	—	14,084	—	12,334	—	—	—	—	2	520	—	—	—	9	27,651
33,001	Sales—1982	580	6,988	—	8,353	5,986	16,301	—	—	8,337	12,765	—	—	5,406	—	3,776	538	68,040
lbs	w/Diesel—1982	341	6,854	—	8,156	5,986	16,294	—	—	8,337	12,765	—	—	5,406	—	3,776	538	67,453
and	Sales—1981	1,249	12,007	—	10,153	9,329	22,302	—	—	10,036	16,473	252	—	7,326	—	3,969	1,982	94,958
over	w/Diesel—1981	675	11,707	—	9,856	9,329	22,285	—	—	10,036	16,473	252	—	7,326	—	3,969	1,981	93,769
Total	Sales—1982	640,902	187,691	109,035	671,476	5,986	33,524	66,945	—	8,337	12,765	—	2,036	5,406	7,286	3,776	586	1,754,731
Total	w/Diesel—1982	79,861	47,588	—	20,198	5,986	29,269	—	—	8,337	12,765	—	2,036	5,406	4,887	3,776	539	219,748
Total	Sales—1981	508,656	140,360	80,119	566,175	9,329	46,829	61,431	—	10,036	16,473	254	2,039	7,326	38,321	3,969	1,909	1,489,226
Total	w/Diesel—1981	33,566	30,227	—	25,495	9,329	39,212	—	—	10,036	16,473	254	2,039	7,326	29,142	3,969	1,870	208,938

Source: Motor Vehicle Manufacturers Assn. Reporting firms do not represent entire industry and data is factory sales from U.S. plants only. Mack figures include Brockway; White includes Autocar and Western Star. Others include Crane Carrier, Divco, Duplex, Hendrickson, Oshkosh, Walter, Flexible and trucks shipped by Freightliner to Consolidated Freightways.

In 1982, total truck factory sales were up 17.8% compared to 1981 figures, an increase of 265,505 units, but most of this increase was in the light-duty range (less than 10,000-lb GVW). Forty-nine percent of all medium-duty vehicles sold in 1982 are diesel powered.

Class VI (19,501- to 26,000-lb GVW) sales dropped 55.6%. The 1982 dieselization rate in Class VI is 38%, the same as 1981.

Class VII (26,000- to 33,000-lb GVW) factory sales were up 17%, but the Class VII rate of dieselization dropped to 54.1%, a dip of 12.5%. This was caused by the reclassification into Class VII of some Class VI gasoline-powered trucks by at least one manufacturer, according to the MVMA, such as GMC with its model C7D042 straight truck.

Sales of Class VIII trucks (heavier than 33,000-lb GVW) were 28.3% lower than 1981 levels, but the dieselization rate is up .4%, to 99.1% from the 1981 rate of 98.7%.

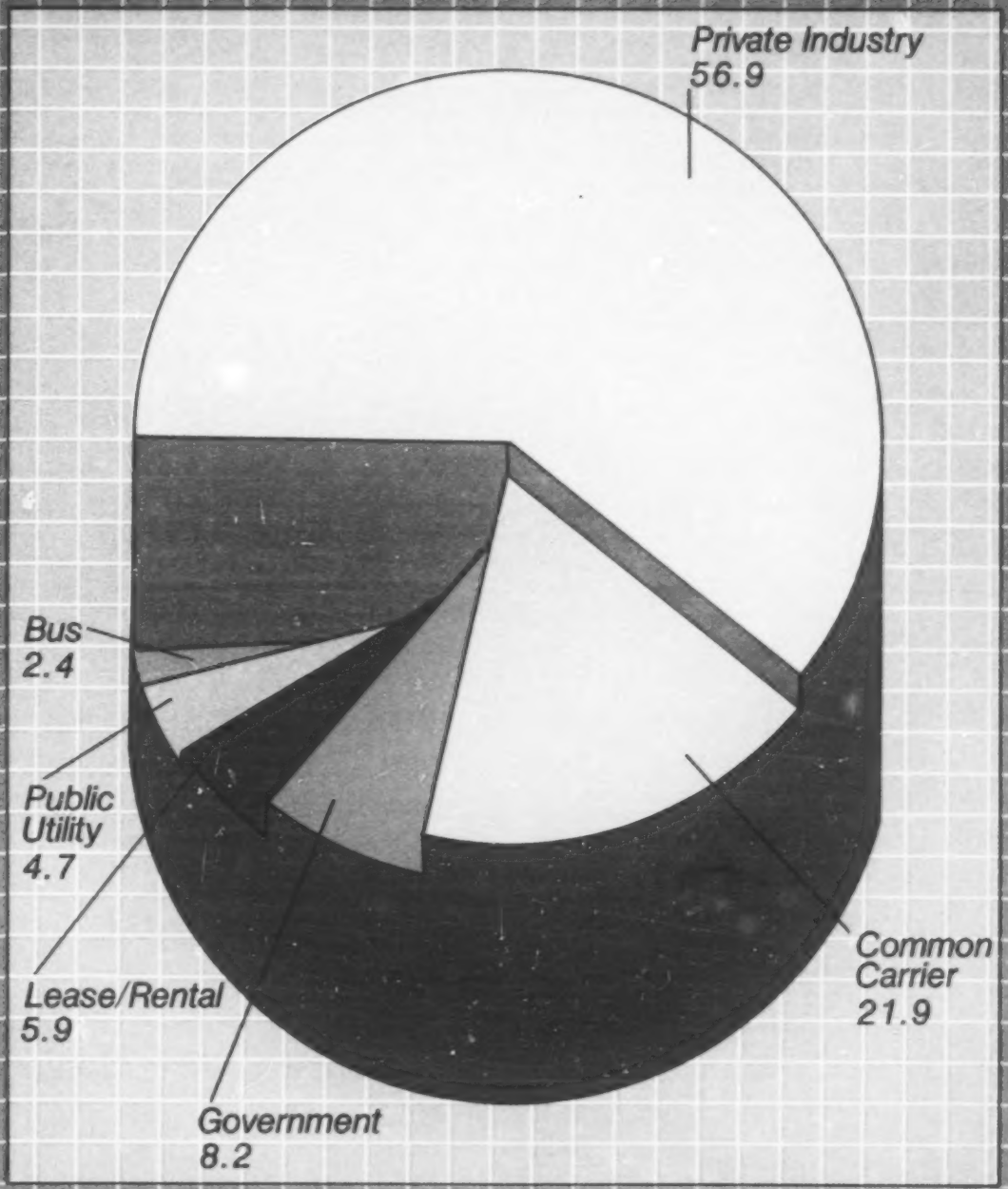
A lot of companies make money forecasting factory sales of vehicles. The problem today is, few are able to do this with any accuracy. For example, the Automotive Market Research Council missed the mark for factory sales of Class VIII trucks by +71% last year. Data Resources, Inc., was off by -50.6%. Their predictions varied by a 124% spread. In fairness to both of these highly regarded institutions, these are not the easiest times within which truck industry market analysts could operate. Indeed, there hasn't been a more fickle period, one more inundated with market forecasting variables, in the truck industry's history.

One forecaster, Jack Klock, an automotive and truck market analyst for 32 years, who was previously a research mathematician and is now chairman of Klock Advertising, has rolled out some pretty good figures during these tenuous times. He missed the 1982 Class VIII factory sales mark last year by only -311 units; that's -0.41%. His 1981 forecast missed by +0.21%; 1980 was off +1.37%. A pretty decent track record against some distinguished competition.

Klock predicts that 1983 factory sales of Class 8 trucks will be 82,354 units.

PRIVATE FLEETS

THE DOMINANT ROLE IN U.S. TRUCKING



PRIVATE FLEETS

By **RICH CROSS,** *Senior Editor*

CCJ's May 1983 statistical analysis of the motor fleet industry illustrates private trucking's dominance over other fleet types in terms of total vehicles operated.

In these times of far-reaching change, private trucking has become as complex as it is huge. This complexity makes it difficult for fleet managers to compare their operations with other fleets, for instance, in terms of efficiency or cost per mile.

Responding to private fleet management's need for comparative data, the Private Truck Council of America, Inc. contracted with researchers at A.T. Kearney, Inc. for an on-going, in-depth private fleet cost study involving more than 300 private carriers across the country.

Recent findings of the study were unveiled to PTCA members in April 1983. Some of these findings are highlighted within this section.

For purposes of the PTCA-Kearney study, a "tractor-trailer fleet" is one where 80% or more of power units are tractors. The same percentage guideline is used to define a "straight truck /van fleet" while a "mixed fleet" is one which fails to fit into either of the previous categories. Data for calendar year 1982 is compared with data acquired for the last six months of 1981.

Kearney notes that lower fuel prices helped to hold the cost-per-mile index fairly steady during this 18-month period, while, in many instances, tighter management controls prevented private carrier operating costs from skyrocketing.

Interestingly, similar private fleet operations were found to differ sig-

Continued

STATISTICAL ANALYSIS OF THE TRUCK INDUSTRY PRIVATE AND COMMON CARRIAGE

FLEET SIZE	TOTAL FLEETS	TOTAL VEHICLES	# OF STRAIGHT TRUCKS OPERATED	# OF TRACTORS OPERATED	# OF TRAILERS OPERATED	# OF BUSES OPERATED	# OF OFF-HIGHWAY VEHICLES OPERATED
500 & over	4053	10,014,046	3,412,972	899,705	2,034,721	478,024	460,247
100—499	14,344	2,631,893	862,405	334,165	608,406	139,254	222,022
50—99	14,798	934,156	314,150	122,002	212,790	62,035	96,860
25—49	21,769	711,829	271,719	86,504	140,035	46,429	70,477
10—24	22,790	373,422	169,598	43,818	62,078	22,098	30,157
TOTAL	**77,754**	**14,665,346**	**5,030,844**	**1,486,194**	**3,058,030**	**747,840**	**879,763**
VOCATION OR BUSINESS							
Common/ Contract	17,080	1,947,729	243,443	448,947	1,063,550	9,467	35,098
Lease/ Rental	4,565	3,366,603	966,504	371,586	747,287	9,761	34,652
Food Industry	9,414	1,044,752	397,931	151,983	288,258	8,705	45,664
Local,State & Federal Government	6,352	2,884,124	1,281,599	131,97	234,536	148,552	353,879
Construction/ Mining	11,665	756,942	309,663	53,576	99,179	3,318	200,260
Manufacturing/ Processing	7,627	1,118,181	314,612	159,149	223,324	6,293	77,701
Petroleum	3,307	336,904	135,052	42,802	61,837	549	14,863
Public Utility	3,664	1,360,052	810,559	14,067	83,462	6,701	61,143
Retail/ Wholesale Delivery	6,283	683,785	281,996	70,693	131,724	5,451	28,141
Services & Unclassified	2,479	501,475	224,298	37,877	119,647	18,984	17,498
Schools	3,436	359,177	54,648	2,132	3,964	256,145	8,846
Bus/Taxi	1,882	305,622	10,539	1,412	1,262	273,914	2,018
TOTAL	**77,754**	**14,665,346**	**5,030,844**	**1,486,194**	**3,058,030**	**747,840**	**879,763**

*Private and for-hire
1. Includes passenger cars
Source: CCJ Census of the Motor Fleet Market, May 1983

nificantly in their degree of performance, vehicle utilization and overall productivity.

Kearney principal, Michael P. Lipman, estimates that between $20 and $25 billion in cost savings are available to private carriage via improvements in their operation. "Private fleets have an opportunity to reduce their operating costs by up to 15%," Lipman says.

For a fleet to gauge its current effectiveness in controlling specific costs, it is necessary to have accurate, benchmark figures as a basis for comparison. The PTCA-Kearney study, although through a limited number of respondents, provides these figures in superb detail.

To obtain a copy of the complete study, contact PTCA at 1101 Seventeenth St. N.W., Washington, D.C. 20036. The cost is $40 to members, $75 to non-members.

In addition to PTCA-Kearney charts, this section lists some of the nation's largest private truck fleets, grouped by vocational category. Data in these lists has been acquired and verified by CCJ within 60 days, unless otherwise noted.

The fleets included in CCJ's study are representative of large private fleets. And the list is not all-inclusive. This is because many private companies consider information about fleet size and the cost to operate their fleet to be proprietary. Further, some highly-diversified corporations simply don't know how many trucks they collectively own or lease, because the fleet is scattered and controlled locally by multiple independent divisions.

A third study of truck fleets, completed in August of 1982 by Chilton Research Services for Rollins Leasing Corp., Wilmington, Del., includes data from 1150 companies operating a fleet of commercial vehicles. Some findings of this study are:

(1) These private fleets transport 75% of their companies' products. And almost half (43%) of these respondents expect the percentage to progressively increase over the next five years.

(2) Fully 70% of all respondents perform their own vehicle maintenance, 13% farm it out to an independent service facility, 10% depend on their leasing company for maintenance, and the remaining 7% have maintenance performed by truck dealers.

Among operators who lease their fleets, only 9% perform their own maintenance, and 83% leave the job to their leasing company.

(3) Of the respondents, 43% employ only union drivers, 53% employ only non-union drivers, while the rest lease their drivers.

(4) An average of 26% of all motor fuel consumed by respondents is purchased on the road, while approximately 72% is drawn from on-site bulk storage, and 2% is supplied by leasing companies.

(5) Slightly less than one-third of respondents rent vehicles. Of this group, 42% say they rent primarily because of vehicle breakdowns, 29% say they rent only when extra equipment is needed, and 26% traditionally rent on a seasonal basis.

Of all those who rent, 78% normally rent tractors, 64% rent trailers and 28% have occasion to rent straight trucks.

(6) Less than four out of 10 respondents (38%) say they're involved in intercorporate hauling. Slightly more than half of this group (53%) operate the fleet as a separate transportation subsidiary.

(7) About 40% of the respondents use one or two contract carriers on a regular basis; 20% use three or four contract carriers; 29% use five or more.

(8) Among those using contract carriers, 56% claim they do so primarily because of lower rates, while 58% cite better service as the prime motivation. Specifically, 72% are of the opinion that contract carriage gives them more schedule reliability than common carriage. And 48% say the use of contract carriage results in fewer labor problems.

What's ahead for private trucking? Opportunity. The opportunity to expand the fleet's contribution to the overall corporate distribution system; the opportunity for innovative organizational restructuring to meet future needs of the company; the opportunity to add to the corporation's bottom line by taking advantage of new operating freedoms provided by deregulation which can mean fewer empty miles, backhauling for profit and greater operating efficiency.

TRACTOR/TRAILER DRIVER AND MECHANIC WAGE RATES (PTCA—A.T. KEARNEY)

Category	Company				Leased			
	Non-Union		Union		Non-Union		Union	
	Dec. '81	1982	Dec. '81	1982	Dec. '81	1982	Dec. '81	1982
Driver Wage Per Hour	$8.61	$8.60	$9.77	$ 9.84	$ 8.90	$ 8.34	$10.73	$10.59
95% Confid. Interv.	±.63	±.51	±.61	±.49	±.81	±.62	±.60	±.83
Per Mile Single	.23	.23	.25	.26	.23	.23	.26	.25
95% Confid. Interv.	±.01	±.01	±.01	±.01	±.02	±.01	±.02	±.01
Team	.17	.16	.15	.15	.16	.14	.14	.14
95% Confid. Interv.	±.02	±.02	±.02	±.02	±.02	±.01	±.01	±.01
Mechanic	8.93	9.21	9.80	10.34	10.14	12.04	13.04	19.32
95% Confid. Interv.	±.67	±.57	±.69	±.61	±2.18	±4.26	±2.90	±6.20

OPERATING STATISTICS (PTCA—A. T. KEARNEY)

Description	Straight Truck/Van		Mixed Fleet	
	Dec. '81	1982	Dec. '81	1982
Miles Driven	46,800,000*	145,200,000	35,300,000*	39,900,000
Average Miles/Trip	146	251	764	735
Number of Drivers	2,464	10,668	623	941
Miles Per Driver	29,300*	35,300	64,200*	56,300
Number of Tractors	134	843	410	539
Number of Straight Trucks/ Vans	2,636	10,021	204	499
Percent Total Empty Tractor Miles	30	36	22	22
Trailer to Tractor Ratio	2.1	2.1	2.2	2.1
Average Miles Per Tractor	55,300*	50,800	80,500*	77,400
Average Miles Per Straight Truck	N/A	26,500	N/A	24,600
Average Miles Per Van	N/A	12,400	N/A	11,900

*Statistic annualized.

OPERATING STATISTICS (PTCA — A. T. KEARNEY)

Description	Tractor/Trailer	
	Dec. '81	1982
Miles Driven	726,600,000*	822,600,000
Average Miles/Trip	1,003	949
Number of Drivers	10,554	12,506
Miles Per Driver	79,400*	75,100
Number of Tractors	7,638	8,969
Number of Straight Trucks/Vans	229	173
Percent Total Empty Tractor Miles	22	24
Trailer to Tractor Ratio	2.3	2.4
Average Miles Per Tractor	100,300*	91,100
Average Tractor Age	N/A	3
Average Tractor M.P.G.	N/A	5.3
Power Units/Mechanic Ratio**	N/A	5.2
Union/Non-Union Fleets	89/84	117/121
Leased/Owned Equipment	103/58	127/91

* Statistic annualized.
** For companies who perform 90% or more of their own maintenance.

[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	On Highway	Total Vehicles	[illegible]	[illegible]
Standard Oil of Indiana/Amoco	Chicago, IL	5000	900	1500	4000	100	11,500	NA	1
Ashland Oil	Ashland, KY	4820	1062	1754	2900	NA	10,536	NA	30
Phillips Petroleum	Bartlesville, OK	3553	296	1123	1575	1875	8422	75	21
Getty Refining (A)	Tulsa, OK	2600	100	125	1200	NA	4025	NA	NA
Petrolane, Inc. (B)	Longbeach, CA	2630	190	460	680	NA	3960	NA	25
Arco Oil & Gas	Dallas, TX	1300	50	300	1300	50	3000	65.8	0
Air Products & Chemicals	Allentown, PA	338	600	1247	520	264	2969	51	0
Texaco U.S.A.	Houston, TX	126	255	344	1134	875	2734	37.7	93
Keer McGee Corp.	Oklahoma City, OK	1500	75	75	700	0	2350	NA	30
Gulf Oil (A)	Houston, TX	136	361	446	1296	72	2311	(C)	(D)
Exxon Co. U.S.A. (A)	Houston, TX	378(B)	375	390	936	0	2079	104.2	0
Pargas Inc.	Waldorf, MD	1145	45	69	78	123	1760	NA	1
Mobil Oil Corp. (A)	Fairfax, VA	48	360	442	20	181	1051	27.1(G)	2
Pyrofax Gas Corp.	Houston, TX	800	6	75	55	0	936	10.5	75

(A) Marketing department only. (B) Includes service vehicles. (C) Trucks- 42 million; Cars- 40 million. (D) All cars are leased. All other equipment is owned. (G) Does not include car or off-highway operation. NA—Not available.

PRIVATE FLEET OPERATING COSTS (PTCA—A.T. KEARNEY)

Cost Category	Tractor/Trailer Cost Per Mile Dec. '81	1982
General and Administrative	$ .08	$ .08
Drivers	.52	.52
Equipment	.66	.68
Total	**$1.25**	**$1.28**
Sample Size	173	239
95% Confidence Interval**	$1.19 to $1.31	$1.22 to $1.30

* Numbers may not add; they represent average costs for those companies that provided information for the category shown.
** With 95% confidence, the average will fall within the range shown.

PRIVATE FLEET OPERATING COSTS (PTCA—A.T. KEARNEY)

Cost Category	COST PER MILE Straight Truck/Van Dec. '81	1982	Mixed Fleet Dec. '81	1982
General and Administrative	$ .20	$ .24	$ .15	$ .11
Drivers	1.32	1.43	.69	.91
Equipment	1.00	.80	.74	.73
Total*	**$2.53**	**$2.37**	**$1.50**	**$1.67**
Sample Size	10	15	26	35
95% Confidence Interval	$1.57 to $3.49	$1.53 to $3.21	$1.17 to $1.83	$1.30 to $2.04

* Numbers may not add; they represent average costs for those companies that provided information for the category shown.

Quality Bakers Corp. of America (F)	Greenwich, CT	14,500	8500	9100	1800	NA	33,900	NA	.02
ARA Services (A)	Philadelphia, PA	12,700	2800	2000	600	1200	19,300	500	0
ITT Continental Baking	Rye, NY	9080	600	720	400	NA	10,800	180.0	60
The W. E. Long Co.(F)	Chicago,IL	8000	800	1000	1000	NA	10,800	160.0	20
Safeway Stores	Oakland, CA	19	2173	4450	970	250	7862	116.2	0
Campbell Taggart	Dallas, TX	4965	622	769	612	NA	6968	120	3
Pepsi Cola Bottling Group	Purchase, NY	1862(E)	1406	1675	479	739	6161	67.6	12
Agway, Inc.	Syracuse, NY	3900	212	1005	0	149	5266	110.0	0
Interstate Brands	Kansas City, MO	4007	394	494	4	0	4899	98.5	0
Carnation Co.	Los Angeles, CA	1052	465	845	1400	1087	4849	NA	NA
American Bakeries	Chicago, IL	3000	276	400	54	NA	3730	13.1	30
The Kroger Co. (B)	Cincinnati, OH	0	959	2701	0	66	3726	92	0
Winn Dixie Stores	Jacksonville, FL	0	1100	1900	460	NA	3460	50	0
Dairymen, Inc.	Louisville, KY	1818	326	749	434	NA	3327	NA	NA
General Mills, Inc.	Minneapolis, MN	600	300	500	1700	NA	3100	6.3	10
The Pillsbury Co.	Minneapolis, MN	21	215	273	1800	0	2309	56.5	5
Holly Farms Poultry	Wilkesboro, NC	270	353	633	408	317	1922	37.5	NA
Southern States Coop, Inc.	Richmond, VA	1250	55	120	130	10	1565	20	0
Oscar Mayer Foods Corp.	Madison, WI	206	57	124	962	65	1424	NA	62
Acme Markets	Philadelphia, PA	21	250	798	250	0	1319	13.0	0
Entenmann's, Inc.	Bay Shore, NY	925	50	100	200	5	1280	30	.5
Giant Food, Inc.	Landover, MD	194	170	879	32	0	1275	11.5	0
Houston Coca Cola Bottling Co.	Houston,TX	614	114	176	182	151	1237	9.0	0
CFS Continental	Chicago, IL	425	309	383	0	0	1117	23.5	21
Sunshine Biscuits	New York, NY	250	25	50	650	0	975	18	0
Continental Grain Co. (C)	Chicago, IL	250	150	200	350	20	970	20	0
Geo. A. Hormel Co.	Austin, MN	131	13	13	675	8	827	26.4	62
Vons Grocery Co.	Elmonte, CA	40	227	543	1	9	820	11.4	8
Stop & Shop Co., Inc.	Boston, MA	2	150	491	95	NA	738	14.6	20
Super Food Services,Inc.	Dayton, OH	2	155	358	202	6	723	17.0	40
Sweet Life Foods, Inc.	Suffield, CT	7	138	280	278	8	711	14.1	20
Drake Bakeries	Wayne, NJ	615	17	35	30	0	697	9.5	0
Certified Grocers of Calif.	Los Angeles, CA	31	421	893	226	NA	678	26.2	40
Red Owl Stores	Hopkins, MN	0	200	440	0	0	640	9.75	30
The Bachman Co.	Reading, PA	412	24	83	30	NA	549	2.5	(D)
Marigold Foods, Inc.	Minneapolis, MN	209	84	154	97	NA	544	8	31

(A) Includes Smith's Transfer, magazine and book division and school bus operations. (B) Distribution fleet only. (C) Industrial Services Group only. (D) All tractors are leased; all other equipment is owned. (E) Includes pickups and miscellaneous other highway vehicles. (F) Cooperative association comprised of independent member companies. NA—Not available.

Hertz Corp.	New York, NY	25,000	(A)	4000	290,000	NA	323,000
Geico Leasing	Minneapolis, MN	50,000	8000	38,000	140,000	NA	236,000
Leaseway Transportation	Cleveland, OH	15,300	10,400	19,900	28,300	4500	78,400
Ryder System, Inc.	Miami, FL	30,000	24,000	18,000	0	0	72,000
Automotive Rentals, Inc.	Maple Shade, NJ	15,260	250	450	35,500	0	51,450
Nationalease	Chicago, IL	30,000	(A)	15,000	NA	NA	45,000
Lend Lease	Minneapolis, MN	4100	(A)	NA	40,000	NA	44,100
Jartran Truck Rental	Coral Gables, FL	11,000	O	19,000(C)	O	O	30,000
Ruan Leasing Co. (D)	Des Moines, IA	500	4047	3170	1000	NA	8717
Saunders Leasing System (E)	Birmingham, AL	1400	4000	3000	O	O	8400
Rollins Leasing Corp.	Wilmington, DE	1450(B)	3800	1750	200	0	7200

(A) Included in "Trucks" total. (C) Utility trailers only. (D) Includes Ruan Transport vehicles. (E) Does not include service fleet. NA—Not available.

Honeywell, Inc.	Minneapolis, MN	2302	0	0	6622	NA	8924	NA	100
Waste Management, Inc.	Oakbrook, IL	3486	316	552	768	892	7529(A)	NA	NA
Goodyear Tire & Rubber	Akron, OH	3226	88	92	2048	35	5489	NA	0
St. Regis Paper Co.	New York, NY	1075	280	570	750	1775(C)	4450	NA	100
Montgomery Ward & Co.	Chicago, IL	2500	265	1260	300	NA	4325	70	100
Crown Zellerbach Corp.	San Francisco, CA	790	414	1035	1045	10	3284	60	.1
Reynolds Electrical Engineering	Las Vegas, NV	2235	102	295	406	NA	3038	26	0
Diebold, Inc.	Canton, OH	1600	0	0	1100	0	2700	NA	99
Pfizer, Inc.	New York, NY	145	0	0	2194	NA	2339	62	86
Brown & Williamson	Louisville, KY	493	2	4	1151	NA	1650	35	0
American Greetings	Cleveland, OH	50	25	60	1450	2	1587	25	86
Texas Industries, Inc.	Dallas, TX	480	150	150	425	200	1405	17	80
American Linen Supply	Minneapolis, MN	1139	10	16	205	5	1359	19.1	0
Terminix International	Memphis, TN	948	0	0	395	0	1343	20	100
Safety-Kleen	Elgin, IL	1205	30	35	64	0	1334	42.5	80
TG & Y Stores Co.	Oklahoma City, OK	93	253	761	200	0	1307	39	93
Davey Tree Expert Co.	Kent, OH	1065	2	2	130	20	1219	NA	0(B)
Caterpillar Tractor Co.	Peoria, IL	282	125	228	481	0	1116	NA	95
Halliburton Services	Duncan, OK	252	171	400	106	NA	929	NA	0
Fisher Scientific Co.	Pittsburgh, PA	15	7	28	790	0	840	NA	99
Rite Aid Corp.	Harrisburg, PA	68	105	237	402	0	802	15	0
R. J. Reynolds Tobacco	Winston-Salem, NC	210	60	109	57	256	692	NA	0
Glasgow, Inc.	Glenside, PA	164	24	150	37	33	408	NA	0

(A) Includes 1618 vehicles classified as "other". (B) With exception of 124 leased cars. (C) Includes logging and construction vehicles. NA—Not available.

SINGLE SOURCE/TRIP LEASING AND TRANSPORTATION SUBSIDIARY (PTCA—A. T. KEARNEY)

	NUMBER OF RESPONDENTS					
Trucking Operation	Would Consider Single Source Leasing				Would Consider Trip Leasing	
	No.		% Total		No.	% Total
	Dec. '81	1982	Dec. '81	1982	1982	1982
Tractor/Trailer	106	136	62%	58%	160	68%
Mixed Fleet	12	16	50	44	18	49
Straight Truck/Van	1	3	9	15	2	10

	TRANSPORTATION SUBSIDIARY							
	Presently Have				Plan To			
	No.		% Total		No.		% Total	
	Dec. '81	1982	Dec. '81	1982	Dec. '81	1982	Dec. '81	1982
Tractor/Trailer	21	31	12%	13%	15	22	13%	11%
Mixed Fleet	1	3	4	8	3	5	15	15
Straight Truck/Van	0	1	0	5	1	1	14	5

Company	Headquarters	Tractors(A)	Trailers	Trucks	Cars	Off Highway	Total Vehicles	Annual Mileage per Vehicle	% Leased
American Tel.&Tel.	Basking Ridge, NJ	150,000	NA	NA	46,000	NA	196,000	NA	NA
GTE Corporation(B)	Stamford, CT	25,704(C)	168	725	8410	NA	35,007	380	8.0
Pacific Gas & Electric	San Francisco, CA	7554	80	2470	3200	77	13,304	NA	0
Georgia Power	Atlanta, GA	2805	30	1003	1802	391	6031	53	0
Southern California Gas	Los Angeles, CA	4032	30	240	1202	323	5827	42	100
Consumers Power Co.	Jackson, MI	3139	60	905	938	590	5632	46	90
General Public Utilities	Parsippany, NJ	2260	25	1103	1427	540	5355	41	90
Los Angeles Water & Power	Los Angeles, CA	2691	50	338	1121	922	5122	NA	0
Consolidated Edison	New York, NY	2760	27	54	1050	68	4500	33.2	0
Niagara Mohawk Power Corp.	Syracuse, NY	2575	30	1050	650	71	4376	40	75
Commonwealth Edison	Maywood, IL	1712	49	751	1690	158	4360	45	1
Florida Power & Light	Miami, FL	2880	50	770	450	50	4200	NA	I
Columbia Gas Distribution	Columbus, OH	2158	8	233	1034	270	3703	40	100
Long Island Lighting Co.	Mineola, NY	1439	11	469	932	441	3292	31	0
Detroit Edison	Detroit, MI	1056	60	693	471	196	2677	15	60
Philadelphia Electric	Philadelphia, PA	1418	22	437	755	23	2655	NA	70
ARKALA, Inc.	Shreveport, LA	1680	22	568	352	NA	2622	32	0
Illinois Power Co	Decatur, IL	1023	5	491	356	313	2257	12.9	0
Florida Power Corp. St.	Petersburg, FL	891	35	517	726	66	2235	23	15
Texas Power & Light Co.	Dallas, TX	340	5	400	700	750	2195	NA	NA
Union Electric	St. Louis, MO	650	15	250	475	600	1990	14	5
Appalachian Power Co.	Roanoke, VA	1040	7	244	435	139	1865	21.2	100
Carolina Power & Light Co.	Raleigh, NC	1053	10	300	520	NA	1860	24.6	0
Ohio Power Co.	Canton, OH	600	14	300	575	65	1554	16	100
Portland General Electric	Portland, OR	750	6	292	320	87	1455	NA	0
Potomac Electric Power Co.	Washington, DC	668	12	121	395	154	1350	12.9	80
Peoples Natural Gas Co.	Pittsburgh, PA	450	5	70	200	15	800	10	75
Northwest Natural Gas Co.	Portland, OR	450	10	55	165	120	800	6.4	0
Metropolitan Edison	Reading, PA	500	4	NA	210	40	754	7	90

(A) A few hundred tractors and trailers included. (B) Domestic fleet only. International operations include an additional 4500 vehicles. (C) Includes vans. NA—Not Available.

INTERCORPORATE AND TOTO AUTHORITY (PTCA—A. T. KEARNEY)

NUMBER OF RESPONDENTS				
Trucking Operation	Participate in Intercorporate Hauling			
	No.		% Total	
	Dec. '81	1982	Dec. '81	1982
Tractor/Trailer	81	108	46%	45%
Mixed Fleet	9	12	33	32
Straight Truck/Van	3	1	25	5

TOTO AUTHORITY								
	Presently Have				Applying For			
	No.		% Total		No.		% Total	
	Dec. '81	1982	Dec. '81	1982	Dec. '81	1982	Dec. '81	1982
Tractor/Trailer	16	27	9%	11%	26	32	17%	16%
Mixed Fleet	1	2	4	5	3	7	12	19
Straight Truck/Van	0	0	0	0	1	1	8	5

TRACTOR/TRAILER DRIVERS (PTCA—A. T. KEARNEY)

Driver Category	COST PER MILE: General and Administrative Dec. '81	1982	Drivers Dec. '81	1982	Equipment Dec. '81	1982	Total* Dec. '81	1982	95% Confidence Interval Dec. '81	1982
Company Non-Union	$ .08	$ .08	$ .45	$ .47	$ .63	$ .66	$1.16	$1.20	$ ± .06	$ ± .06
Company-Union	.08	.08	.56	.58	.70	.72	1.34	1.37	± .14	± .08
Leased Non-Union	.06	.07	.44	.42	.62	.62	1.11	1.10	± .05	± .06
Leased-Union	.10	.09	.63	.57	.67	.64	1.39	1.30	± .15	± .09

*Numbers may not add; they represent average costs for those companies that provided information for the category shown.

TRACTOR/TRAILER EQUIPMENT (PTCA—A. T. KEARNEY)

Type Equipment	COST PER MILE: General and Administrative Dec. '81	1982	Drivers Dec. '81	1982	Equipment Dec. '81	1982	Total* Dec. '81	1982	95% Confidence Interval Dec. '81	1982
Owned	$ .08	$ .09	$ .51	$ .56	$ .61	$ .66	$1.19	$1.29	$ ± .08	$ ± .06
Leased	.08	.08	.52	.48	.69	.69	1.29	1.25	± .09	± .06
Mixed	.08	.07	.54	.52	.65	.65	1.26	1.24	± .19	± .14

Type Equipment	Average Miles Per Trip Dec. '81	1982	Average Miles Per Driver Dec. '81	1982	Average Miles Per Tractor Dec. '81	1982
Owned	816	662	74,900	65,900	83,900	77,400
Leased	1,127	1,181	82,300	81,100	109,700	101,800
Mixed	781	786	75,600	78,200	102,300	86,200

*Numbers may not add; they represent average costs for those companies that provided information for the category shown.

[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
U.S. Postal Service	107,915	10,060	0	NA	117,975
General Services Administration (A)	33,485	53,048	192	2991	89,716
Army	33,887	11,022	1086	3363	49,358
Air Force	35,588	5048	1071	2194	43,907
Navy	26,996	4256	635	1285	33,172
Agriculture Dept.	26,365	463[illegible]	0	53	31,056
Interior Dept.	12,460	2080	14	284	14,838
Justice Dept.	2456	1707	250	124	12,293
Department of Energy	9223	2016	62	289	11,590

(A) Most vehicles are in Interagency Motor Pool and rented or leased to other government fleets. There is no duplication with other fleets listed. * Source: General Services Administration Report, printed 1982. NA—Not available.

CITY GOVERNMENT*	Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	% Leased
Columbus, OH	1137	34	153	1333	2113	4770	21	.04
Los Angeles, CA	2911	25	50	934	623	4543	47	.005
Atlanta, GA	811	103	96	1282(B)	2228	4520(C)	NA	0
Baltimore, MD	1375	7	13	1547	354	3289	NA	0
San Francisco, CA	815	30	15	1017	1254	3131	NA	0
Cincinnati, OH	1300	10	100	700	800	2910	NA	0
Kansas City, MO	1075	55	25	550	395	2100	NA	0
Tampa, FL	661	68	92	848	349	1928	12.9	.05
Portland, OR	252	10	40	910	72	1642(E)	NA	NA
Long Beach, CA	583	3	60	561	256	1463	10.4	0
San Diego, CA	900	2	50	300	225	1450(G)	NA	0
San Jose, CA	440	6	57	577(D)	288	1368(A)	9.8	.7
Norfolk, VA	475	120	20	510	90	1350	NA	0
Anaheim, CA	331	1	87	329	582	1330	5.7	.0037
Louisville, KY	404	60	15	459	165	1103	NA	NA
Oakland, CA	466	5	21	456	142	1090	NA	0
Riverside, CA	487	2	85	188	161	1028(F)	NA	0
Greensboro, NC	340	6	75	350	130	901	8.5	0
Ft. Lauderdale, FL	275	13	117	300	80	785	11.5	3
Montgomery, AL	314	1	20	387	36	758	NA	0
Albany, NY	362	4	50	115	169	700	NA	0
Huntington Beach,CA	200	25	50	250	75	600	NA	0
New Orleans, LA	354	5	13	140	6	518	NA	20
Yonkers, NY	213	2	2	269(D)	15	501	.75	0
Pensacola, FL	177	10	15	134	105	441	NA	0

*May not include all departments. (A) Does not include water and fire depts. (B) Includes some motorcycles. (C) Includes miscellaneous on/off-road, non-self-propelled vehicles. (D) Includes police fleet. (E) Includes 358 miscellaneous vehicles exclusive of listed configurations. (F) Includes 32 motorcycles, 61 scooters and 12 street sweepers. (G) Does not include police and fire depts. NA—Not available.

STATE GOVERNMENT*	Headquarters	Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	Leased
Texas (SDH & PT)	Austin	7018	106	594	1211	8248	17,177	100	0
California (DOT)	Sacramento	4569	36	296	2737	3508	11,146	NA	0
Kentucky (DOT)	Frankfort	3300	20	37	1429	4800	9586	NA	0
Ohio (DOT)	Columbus	3366	29	89	1300	4464	9248	25	0
Virginia (Hwy. Dept.)	Richmond	3700	50	55	2500	2775	9080	NA	0
South Carolina (SDH&PT)	Columbia	2761	50	352	1730	1934	6827	49	0
New York (DOT)	Albany	3310	60	103	925(C)	2400	67[illegible]	49	0
Missouri (Hwy.Dept.)	Jefferson City	1834	8	16	580	3360	5798	NA	0
Illinois (DOT)	Springfield	3127	12	300	727	NA	4166	54	0
Minnesota (DOT)	St. Paul	2245	43	55	345	1055	3743	35	0
Kansas (DOT)	Topeka	1265	17	30	257	1000	3580	NA	0
New Jersey (DOT)	Trenton	1335	7	7	679	712	2740	26.5	20
Maryland (DOT)	Baltimore	950	14	16	250	987	2217	NA	0
Connecticut	Wethersfield	1289	35	55	420	325	2124	NA	0
Wyoming (Hwy. Dept.)	Cheyenne	422	21	113	271	1276	2103	18	0
South Dakota (DOT)	Pierre	896	9	62	124	485	1576	10.2	0
Idaho (ITD)	Boise	919(D)	19	182	225(E)	NA	1345	18	0
Maine (DOT)	Augusta	638	15	6	475(F)	NA	1134	28	0

*May not include all departments. (C) Includes some vans and carryalls. (D) Includes 343 pickups. (E) Includes 129 vans. (F) Includes 238 pickups. NA—Not available.

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CHILTON'S JULY 1983

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for Private Fleets & For Hire Trucking

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air pressure, Davis explained. Because the Webster-Heise valve produces a type of blockage in the engine, the air pressure would change and the octane rating drop.

THe second series of tests at the Denver facility has already begun, according to Davis. Baseline evaluations without the valve have been completed, and officials are now waiting for Webster and Heise to install their device.

"We're ready to go when they are," Davis said.

NHTSA officials emphasized the tests have been conducted "fairly and on as controlled a basis as possible." Observers were present at all times, Davis said, to eliminate suspicion and reassure both sides that testing was fair and proper.

Although the device has never been tested on a truck, the inventors believe it would work well in most gasoline engine vehicles.

Webster also revealed that General Telephone and Electronics and the Bank of America have agreed to finance testing the valve on 1981 Chevrolet Citations using methanol fuel. Tests will be conducted by the California Air Resources Board. Webster said the California results may be available even before the NHTSA evaluation is complete.

Computer glitches ravage CCJ's Top 100

Commercial Carrier Journal has painfully entered the era of computerized magazine publishing. In last month's issue, the Top 100 and Second 100 charts are riddled with computer errors. As a result, some of the information in these two sections of the June issue is either misleading or confusing. Following are corrections, amplifications and four replacement columns that you can tape or paste over the affected columns in the Second 100 charts.

- **pages 91 and 93**

Maintenance Data totals shown are for 1981 and should be deleted. These totals for 1982 were not used; they are meaningless because a large number of fleets did not file this information.

- **pages 96 and 97**

Far right columns on both pages have 1982 and 1981 operating ratios listed together. Corrected columns are provided on the right.

The footnote on page 97 should be deleted.

The *Financial Data* totals listed on page 97 are for 1981. These totals for 1982 are:

- gross operating revenues: $3,608,786,000
- expenses: $3,539,307,000
- net income after taxes: $20,570,000.

Rank '82	1982 Oper. Ratio	1981 Oper. Ratio
101	97.3	96.6
102	98.1	98.5
103	98.1	93.9
104	89.8	88.8
105	88.9	86.1
106	100.9	98.8
107	106.1	101.1
108	103.4	100.6
109	99.0	96.6
110	97.9	97.9
111	86.7	85.2
112	97.8	96.4
113	96.9	94.5
114	100.5	98.8
115	95.8	98.9
116	90.8	93.1
117	95.8	88.9
118	98.0	100.4
119	97.8	94.7
120	112.7	104.4
121	93.8	96.1
122	102.4	97.6
123	94.2	92.9
124	95.6	96.6
125	98.5	99.3
126	104.9	102.5
127	92.0	92.7
128	99.6	98.2
129	85.0	91.4
130	97.2	96.0
131	104.4	99.2
132	94.2	92.0
133	92.1	86.2
134	97.7	99.3
135	104.1	99.4
136	97.6	81.4
137	99.0	96.4
138	93.6	84.8
139	94.1	94.2
140	102.4	99.8
141	94.4	92.1
142	100.6	95.6
143	94.4	96.3
144	91.1	90.5
145	99.0	98.4
146	102.0	79.5
147	99.1	97.5
148	92.6	94.1
149	95.7	91.3
150	99.1	99.8

Rank '82	1982 Oper. Ratio	1981 Oper. Ratio
151	99.7	108.8
152	99.7	98.1
153	101.0	100.0
154	96.9	94.6
155	100.9	99.3
156	95.6	
157	103.0	98.1
158	100.8	101.5
159	91.0	91.4
160	98.2	97.6
161	98.9	97.0
162	98.1	98.0
163	96.8	96.5
164	93.2	89.7
165	103.2	96.7
166	101.4	97.5
167	99.0	99.9
168	101.0	97.8
169	99.6	99.3
170	96.6	94.8
171	99.6	95.6
172	99.8	96.6
173	102.5	94.9
174	94.4	94.9
175	94.6	87.2
176	100.3	98.0
177	97.7	96.9
178	100.5	98.6
179	97.1	97
180	93.4	92.2
181	100.7	100.8
182	104.4	100.4
183	95.6	95.0
184	89.3	86.2
185	99.1	97.4
186	99.3	92.3
187	88.8	89.6
188	99.6	101.5
188	103.6	100.7
189	96.7	94.9
190	89.4	91.9
191	154.6	112.7
192	89.1	95.3
193	93.9	94.8
194	89.8	90.2
195	98.6	96.8
196	91.4	92.6
197	101.9	101.5
198	106.0	101.1
199	99.7	99.7
200	99.2	97.4

Six charged by Justice Department with rate fixing

From CCJ's Washington Bureau

A grand jury investigation of trucking activities between the Northeast United States and Ontario, Canada, has resulted in the filing of a civil antitrust suit against five Canadian trucking companies and the Niagara Frontier Tariff Bureaus of Buffalo, N.Y.

The suit filed by the U.S. Justice Department is aimed at blocking alleged price fixing by the six defendants. Named in the complaint were: Bondy Cartage Ltd. of Windsor, Ontario; Dominion-Consolidated Truck Lines of Toronto; ICL International Carriers, a subsidiary of Industrial Cartage Co. which is owned by Piggy-Back Services, Inc., of Detroit; Inter-City Truck Lines of Toronto; and TNT Canada, a unit of All Trans Canada which is owned by Thomas Nationwide Transport of Sydney, Australia. Thomas Nationwide also owns Pilot Freight Lines.

The Justice Dept. alleges that the price fixing occurred between 1966 and at least until 1981. Spokesman William Baxter said the companies interfered with the right of tariff bureau members to set rates independent of the bureau's rates and so exceeded their rate-setting authority.

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IN THE FEATURE SECTION:

Should professional truck drivers be tested, licensed and regulated by the federal government? After reading the story *What To Do About Problem Truck Drivers*, page 56, you may have some ideas. The editors of CCJ would like to know your feelings on this vital question. At stake is the image and the reputation of hundreds of thousands of drivers who make trucking their livelihood.

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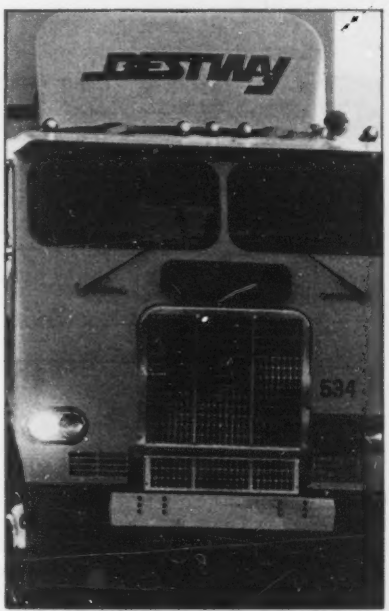

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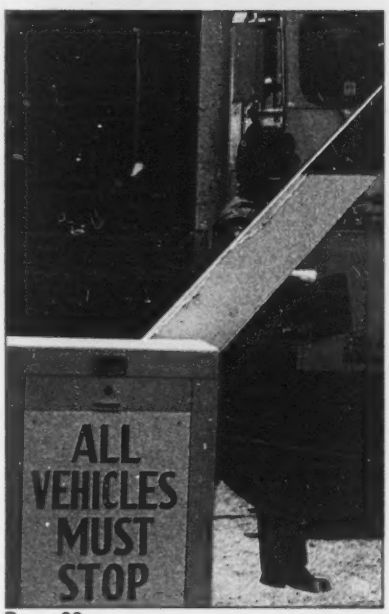

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WHAT TO DO ABOUT PROBLEM TRUCK DRIVERS

No state or governor fought harder to keep out double bottoms than William O'Neill of Connecticut. Perhaps he has justification. Last January, a professional truck driver from North Carolina crashed his rig into a toll booth on the Connecticut Turnpike. Seven people died. The circumstances surrounding that accident tragically illustrate what is wrong with trucking today. **56**

EAST MEETS WEST AT BESTWAY

This Phoenix-based for-hire carrier mixes respect and sensitivity for employees with a no-nonsense safety program making the company seem like a dream place to work. **62**

MAKING A CASE FOR SECURITY

The full burden of eliminating pilferage is now the responsibility of for-hire motor carriers. And they are not doing a very good job. Motor carrier losses from theft and pilferage are in excess of $3 billion and going up. While some ignore it, smart carriers have turned the problem around to their advantage. **66**

PRE-EMPLOYMENT SCREENING: WEEDING OUT TROUBLE

To conceal bad driving records, many drivers give false or incomplete data on job applications. The deception works because carriers have limited resources for verifying past performance. In self defense, more and more fleets are beginning to turn to pre-employment screening for help. **71**

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DEFICIENT BRIDGES TEN WORST STATES

State	Number of Bridges in Inventory	Structurally Deficient No.	Structurally Deficient %	Functionally Obsolete No.	Functionally Obsolete %	Deficient Bridges No.	Deficient Bridges %
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Missouri	23,525	4946	21.0	11,405	48.5	16,351	69.5
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Iowa	26,217	5707	21.8	7600	29.0	13,307	50.8
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
No. Carolina	15,424	5680	36.8	5585	36.2	11,265	73.0
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Indiana	17,650	4684	26.5	5987	33.9	10,671	60.4
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Nebraska	16,413	4829	29.4	5412	33.0	10,241	62.4

Structurally deficient bridges cannot accommodate the truck weight for which they were originally designed. They are either posted with weight restrictions or closed entirely.

Functionally obsolete bridges have geometric features which do not safely accommodate current traffic volumes. A single-lane bridge that joins two-lane highways and restricts the flow of traffic is an example.

Developed by the Highway Users Federation from information listed in DOT's "Highway Bridge Replacement and Rehabilitation Program — Fourth Annual Report to Congress." Figures current as of December 31, 1982.

LATE NEWS WIRE

The National Truck Equipment Association reports that the strongest period of 1983 in the sale of Class 8 trucks will be in the fourth quarter. NTEA says the sale of trucks 33,001 lb and over reached its lowest point at the end of 1982, falling 14.5% below 1981 levels. But NTEA also says sales of Class 8 vehicles will increase 14.7% this year, jumping even higher to 25.5%—over the second half of 1983—in the first half of 1984. The association is predicting 116,200 Class 8 sales in 1984, making it the strongest year since 1981. Sales of Class 6 and 7 trucks, however, will continue to be slow.

P.L. Cowling, intermodal vp for The Milwaukee Road, told members of the Northwest Shippers Advisory Board the "45-foot trailer is coming on faster than most [of us] ever envisioned and much faster than the flat [railroad] car can be modified to keep pace." Seventy-five percent of the van-type trailers being produced today are 45 ft or longer, the Truck Trailer Manufacturers Association reports. Cowling also said only about half or 25,597 trailer trains can accommodate the 102-in. trailer, while another 11,700 can be modified to handle it.

States adopting the federal truck size and weight regulations now include the following: Arizona, Arkansas, Colorado, Georgia, Hawaii, Idaho, Indiana, Iowa, Kansas, Maine, Maryland, Minnesota, Mississippi, Missouri, Montana, Nebraska, New Jersey, North and South Dakota, Tennessee, Texas, Vermont, Virginia, Washington, West Virginia and Wyoming.

Brae Corp. of San Francisco arranged financing and sale of $16 million of piggyback trailers to a limited partnership. Brae says it will be the equipment manager for the partnership.

Mianus River span failure points up nation's need for massive bridge repair program

By **LEO ABRUZZESE,** *Washington Editor*

More than 250,000 U.S. bridges are either structurally deficient or functionally obsolete, the Department of Transportation has acknowledged in the wake of last June's fatal collapse of the Mianus River Bridge on a stretch of Interstate 95 in Connecticut.

However, an industry engineer said problem bridges will not affect the vast majority of truck fleets and suggested "there is little to worry about" in terms of frequent future catastrophies.

Richard Lill, a highway engineer with American Trucking Associations, said: "Since the majority of these deficient bridges are on smaller highways where trucks don't travel anyway, there shouldn't be much effect on the industry."

According to the Federal Highway Administration, 132,154 bridges are structurally deficient. This means they cannot accommodate the truck weight for which they were originally designed and are either posted with weight restrictions or closed.

Functionally obsolete bridges, of which there are 121,042, cannot safely handle current traffic volumes, i.e., a single-lane bridge that joins two-lane highways, rstricting traffic flow. Many of these bridges are on county and township roads where little commercial trucking takes place, Lill said.

Because local governments rate bridges according to their load carrying capacity, he added, structurally deficient bridges should not prove hazardous for truck fleets. "The safety restraint is there," Lill said. "Posted signs mean no vehicle should be operating on that bridge that would put it in danger."

There are 565,443 highway bridges on public roads in the U.S., according to the Department of Transportation. Of the 253,196 deficient bridges, 68,645 are located on the federal-aid system. However, the majority of defective spans are found on so-called "off-system" roads where construction and maintenance are the sole responsibility of the states.

According to DOT's Highway Bridge Replacement and Rehabilitation Report, 3500 bridges on the federal-aid system become deficient each year. Off-system bridges are not deteriorating as quickly, the report says, probably because a higher percentage are already considered sub-par.

Half of all deficient bridges are located in 10 states, according to an analysis prepared by the Highway Users Federation (see chart). In Texas alone, there are more than 17,000 problem bridges, while in North Carolina, more than 7 out of every 11 are inadequate in some way.

Federal officials say it would cost $48.9 billion to repair or replace all of the

Continued

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Canadian truckers are invading U.S., ATA says

From CCJ's Washington Bureau

More than 400 grants of operating authority have been awarded to Canadian-owned or domiciled motor carriers since President Reagan lifted his international trucking moratorium last November, American Trucking Associations said last month.

In a statement submitted to the Ontario Highway Transport Board, ATA said the Interstate Commerce Commission has been routinely processing Canadian carrier requests while U.S. based carriers received "less than a handful" of operating grants from any Canadian province in the last six months.

The U.S./Canadian trucking dispute began in late 1980 after the Motor Carrier Act greatly eased entry into the American industry. Canadian fleets began applying for U.S. authority while American carriers encountered restrictive public convenience and necessity tests north of the border.

After a brief moratorium, the U.S. and Canadian governments signed a bilateral accord last December that set up a consultative mechanism to iron out future border disputes. However, the basic inequities between the two nation's entry policies remained unchanged.

"In many cases," ATA said, "the authority received by the U.S. carrier in Canada resulted from the purchase of an existing Canadian carrier. Thus, while the party operating the authority may have changed, the number of carriers operating in the market in question did not change."

The American industry claims that the 400 grants to Canadian carriers represents much new competition for U.S. fleets, many of which are restricted to serving Canadian customers on an interline basis. Most grants to Canadian carriers are for direct single line service.

ATA also claims the ICC allows most Canadian applicants to provide domestic, interstate service within the U.S. while provincial authorities rarely allow American carriers to serve intra-Canadian markets.

"U.S. carriers," says the association, "are now faced with increased competition not only for their traditional share of the transborder freight, but domestic U.S. freight as well."

In a related development, the Canadian Manufacturers Association advised the OHTS that regulatory reform is overdue and urged elimination of historically retrictive policies like the public convenience and necessity test.

"The Ontario trucking industry is mature and stable enough to withstand a freer entry process and competition from U.S. based carriers," CMA said, adding "...we see no reason why direct line transborder transportation should be reserved for Canadian-based carriers to the exclusion or restriction of American motor carriers."

While the industry is concerned over Canadian truckers, similar threats from Mexican truckers have eased due to that country's economy.

Mianus River span failure points up need Continued

deficient bridges in the U.S.—$26.7 billion for those on federal-aid highways and $22.2 billion for off-system bridges.

The Surface Transportation Assistance Act, approved by the Congress last December, provides substantially increased funding for bridge repair. The federal government will spend $1.60 billion on bridge work this year, 78% more than the $900 million earmarked for 1982. By 1986, DOT will be allotting $2.05 billion annually for bridge rehabilitation.

The federal government supplies 80% of all highway and bridge funding; the states must raise the remaining 20%.

Woodrow W. Rankin, a spokesman for the Highway Users Federation, confirmed: "States are raising their own highway user taxes to fix up roads and bridges." Industry associations, especially ATA and the Private Truck Council of America, believe trucks are being singled out for unfair tax treatment and are fighting hard for reasonable levies. Rankin warned that money must be available, however, because "we have an enormous number of bridges in this country, many of them old bridges never designed to carry today's traffic volumes."

Federal officials acknowledge that truck traffic on many bridges exceeds what the span was originally designed to handle. But Stanley Gordon, chief of the bridge division of FHWA's Office of Engineering, says heavy truck traffic won't cause a collapse like the Miamus River incident.

Over time, Gordon explained, steel used in bridge construction begins to weaken or "fatigue." Bridges have a stress range and are designed for a certain amount of wear. "A bridge can't even tell when a car is on it," Gordon said, "but it can tell when a truck rolls over." If there is a substantial increase in truck traffic beyond what the bridge was built to handle, the bridge's life can be reduced. "Instead of lasting 100 years, for example, it may only last 75 years," Gordon explained.

Steel fatique, brought on by increased truck traffic, can cause small cracks. However, crack growth is slow if the metal is tough, and bridge inspectors are trained to spot problems, Gordon said.

Although the cause of the Mianus River Bridge collapse is still officially under investigation, steel fatique apparently was not a factor. One industry engineer described it as a "hung" bridge, suspended by hangers. "If one of the hangers fails, you have a collapse," he said.

EDITOR'S NOTE: In The June Top 100 report, CCJ reported that J.B. Hunt Transport, Lowell, Ark., was basically an owner operator company. Kirk Thompson, financial vice president, says J.B. Hunt has only three owner operators out of 500 company drivers.

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